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PrimeroEdge Food Service Solutions
PrimeroEdge Menu Planning User Manual

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◀ *End of Contents* ▶

1 Quick View of Menu Planning

This section provides:

- ✓ A brief overview of Menu Planning concepts
- ✓ Order of completion of configuring Menu Planning items
- ✓ Review and use of Menu Planning data sources

Configuration

The end goal of Menu Planning is to create Menu Calendars for use in the timely production of Menu Items. The first step is to complete the process of configuration. The [Menu Planning] module must have certain structures in place before the primary tasks of adding Ingredients, Recipes, Menus, etc., can be started. These structures are set up through functions on the **Configuration** menu.

Some functions can be completed at any time, while others must be set up before other functions can be completed. Your PrimeroEdge Implementation team may set up many of these structures for you.

A Set Up Data Sources and Meal Patterns

Data Sources and Meal Patterns are independent of each other, and therefore do not have a required sequence or order of set up.

Data Sources & Versions

Data Sources are collections of Ingredients and Recipes, such as the Child Nutrition (CN) data source, which are available for use by any district. These recipes and ingredients are ready for immediate use as is.

Custom Data Sources are added with help from PrimeroEdge Support. See page 190 for information on Data Sources and Versions.

Meal Pattern

Five (5) **Meal Patterns** are automatically included when PrimeroEdge [Menu Planning] is initially installed. A Meal Pattern includes the USDA standards set for Nutrients and Food Components required for Lunch and Breakfast Meal Services for groups of patrons (Serving Groups) such as K-5 or 9-12 grades. These Meal Patterns are ready for immediate use as is.

Custom Meal Patterns are added with help from PrimeroEdge Support. Refer to page 185 for details on Meal Patterns.

B Set Up Supporting Menu Details

These five configuration details are independent of each other, and therefore do not have a required sequence or order of set up. However, they must be set up before creating Recipes, and creating or assigning Menus.

HACCP Configuration

Three (s) **Hazard Analysis** processes and seven (7) **Critical Control Points** are automatically provided by PrimeroEdge [Menu Planning]. Custom processes can be set up, if needed. HACCP processes are selected when creating a Recipe. Refer to page 174 for details on HACCP processes.

Holiday Schedule

The **Holiday Schedule** is a calendar where holidays, In-Service days, and other special days are designated on which Meal Service is not provided. Menus should not be assigned to a Menu Calendar.

The Holiday Schedule must be set up before assigning Menus to a Menu Calendar so that the menu planner can indicate if / when Menus are to be assigned to scheduled holidays. See page 181 for the steps to add holidays to the Holiday Schedule.

Menu Item Categories

Menu Item Categories help to organize Menu Items. Menu Item Categories are selected when building Menus along with the number of choices allowed from each category. See page 145 for information on Menu Item Categories.

Site Groups

Site Groups group schools or sites that serve the same menus. Menus can be assigned to a Site Group rather than individual schools, thus saving time for the Menu Planner.

Site Groups are used to create a Menu or Menu Cycle, to assign Menus to a Menu Calendar, and to generate reports for groups of sites. See page 161 for site group creation details.

Menu Lines

Menu Lines support offering separate food “themes”, such as Sandwiches, Pizza, Salads, etc., where Menus are built around a particular theme. Menu Lines are used to narrow menu choices when assigning menus. Menu Lines are also specified when configuring a site. See page 158 for details on Menu Lines.

C Configure Sites

Configuring sites is completed after Meal Types (Meal Patterns), Site Groups, and Menu Lines are set up. See page 170 for details on configuring sites.

Site Configuration

Site Configuration must be completed for each site providing meal services. Configuring a site includes identifying all Meal Types (set up in Meal Patterns) and Menu Lines offered at the site, the Site Group to which the site belongs, and the date that meal services start (Effective Start Date).

D Select Standard Menu Items

Standard Menu Items are selected from available Menu Items. Menu Items are created from Recipes. Therefore setting up Standard Menu Items is completed after Recipes and then Menu Items have been created. Refer to page 40 for the steps to create a Menu Item from a Recipe.

Standard Menu Items

Standard Menu Items is a set of Menu Items that are included on all or most Menus. Standard Menu Items are added to a Menu by either a) clicking the **Standard Menu Items** button on the **Menu Info** page or b) automatically by enabling the [Menus – Include Standard Menu Items by Default](#) system setting. See page 155 for details on creating Standard Menu Items.

E Create Menu Templates

Menu Templates reduce the effort and time required to create individual Menus.

Menu Templates

Items common to all or most menus, such as Meal Pattern and Menu Item Categories are selected for a Menu Template. The template is then used as the basis to add a new Menu which eliminates repetitive Menu creation configuration tasks.

Before this configuration task can be completed, Meal Pattern(s) (which define Meal Types and Serving Groups) , Menu Items, Menu Item Categories, Standard Menu Items, and Site Groups must be set up. See page 148 for the steps to create Menu Templates.

Ingredients, Recipes & Menu Items

After configuration tasks are complete, the second step is to add Ingredients and then build Recipes with the Ingredients.

A Add Ingredients

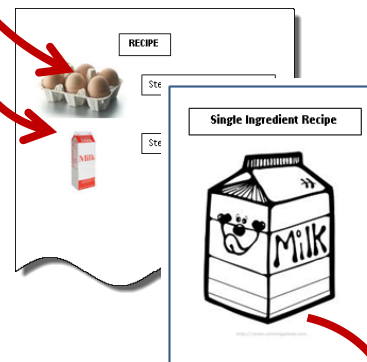
All Ingredients to be used in the production of Recipes are added. Ingredients can be “raw” products, such as milk, eggs, flour, etc., or a purchased product that is either used as purchased (half pint milk carton) or combined with other purchased products (hamburger buns and meat patties).

Nutrients and allergens are recorded for each Ingredient. Images of nutrition labels or other supporting documentation are uploaded.



B Build Recipes with Ingredients

Recipes are built from a Single Ingredient, such as a half pint of milk, or by selecting Ingredients and entering instruction steps.



C Create Menu Items from Recipes

Menu Items are created with a Recipe by choosing a Menu Item Category and setting food component contributions.



Menus & Menu Cycles

After Ingredients and Recipes are added and Menu Items are created from Recipes, adding and working with Menus is the next step.

A Add Menus

A menu is added by selecting a Meal Pattern, a Meal Type and Site Group. Serving Group(s) are selected and projected meal counts for each are set.

Menu Item Categories, such as Entrees, Milk, Condiments, etc., are selected for the Menu, and the number of allowable choices from the category is set. Menu Items in each category are selected individually, or all Standard Menu Items can be added by simply clicking a single button. Counts are set for each Menu Item.



B Add Menu Cycles

Two or more menus are grouped into a “Menu Cycle”. A common Menu Cycle includes five menus, one for each day of the school week. However Menu Cycles can include any number of weeks, such as four to handle an entire month of Menus, and any number of days per week.



C Assign Menu Cycles

Menu Cycles are assigned to dates on a Menu Calendar. One Menu Calendar is created per month for a Site Group, Site, Meal Type, and Menu Line.

A diagram showing a menu calendar grid. A red dashed box highlights a five-day menu cycle starting from Monday. An arrow points from the menu cycle diagram above to this box.

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
	Fiesta Menu	German Menu	Italian Menu	Indian Menu	Asian Menu	
	Indian Menu	Asian Menu	German Menu	Italian Menu	Fiesta Menu	
	German Menu	Fiesta Menu	Indian Menu	Asian Menu	Italian Menu	
	Italian Menu	Asian Menu	Fiesta Menu	German Menu	Indian Menu	

Reports

PrimeroEdge Menu Planning provides summary and detailed information for Ingredients, Menu Items, Recipes, Food Components, and more to aid in developing Menus that meet USDA standards.

Food Components

Standard Nutrients footer

Serving Group tab (expanded view) – [Menu](#) / [Menu Cycle](#) / [Multi-Line Analysis](#)

Nutrition Report – [Menu](#) / [Menu Cycle](#) / [Multi-Line Analysis](#)

Food Component Report – [Menu Cycle](#) / [Multi-Line Analysis](#)

Nutrition Summary Report – [Menu Cycle](#)

Reports menu

Weekly Nutrient Analysis

Nutrients

Standard Nutrients footer

Serving Group tab (expanded view) – [Menu](#) / [Menu Cycle](#) / [Multi-Line Analysis](#)

Nutrition Report – [Menu](#) / [Menu Cycle](#) / [Multi-Line Analysis](#)

Nutrition Summary Report – [Menu Cycle](#) / [Multi-Line Analysis](#)

Recipes > Quick Recipe page > Generate Report

Reports menu

Ingredient List

Menu Calendar

Menu Item Nutrients

Nutrient Standards

Recipe Nutrition

Recipe Book

Weekly Nutrient Analysis

Ingredients

Recipes > Quick Recipe page > Generate Report

Reports menu

Ingredient List

Recipe Book

Menu Items

Reports menu

Acceptability Factor

Allergen Chart

Menu Calendar

Menu Item Nutrients

Recipes

Recipes > Scale tab

Custom Scale Recipe

Scale Recipe by Batch

Reports menu

Recipe Book

Recipe Costing

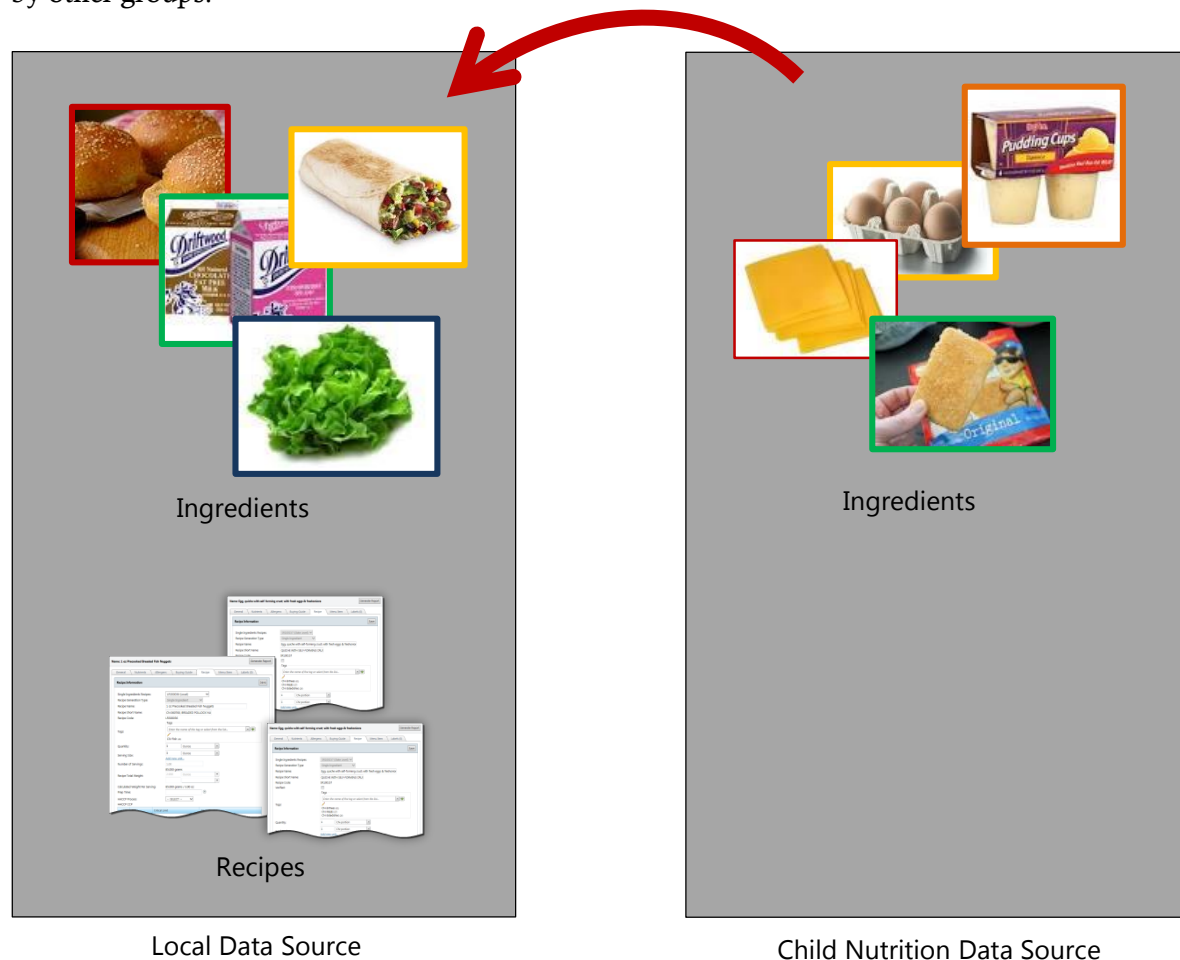
Recipe Nutrition

Data Sources

A Data Source is a container for Ingredients, Recipes, Menus, Menu Cycles, and Menu Templates which are available to and may be changed by appropriate users. When an Ingredient or Recipe is manually entered or created “from scratch,” the item is stored in the “Local” Data Source. The Local users’ group can use, copy or update the item as needed.

When PrimeroEdge Menu Planning is installed, the Child Nutrition Data Source is uploaded for use. This database includes Ingredients that can be used in Local Recipes. The Ingredients in the CN database are “shared” with Local users and cannot be modified. However, they can be copied to the Local Data Source and the copied items can be modified to suit local requirements.

Sharing resources in this manner saves time because items do not have to be duplicated for use by other groups.



Many pages in the Menu Planning module offer a **Data Source** selection. When you have access to multiple Data Sources, a selection can be made. When you have access only to a single Data Source that Data Source name appears in the selection box and the selection box is disabled.

◀ *End of Section* ▶


2 Ingredients

This section reviews:

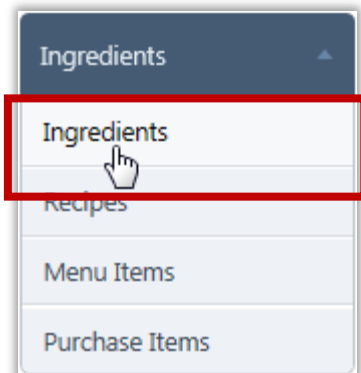
- ✓ Adding a new Ingredient or Recipe.
- ✓ Creating a Single Ingredient Recipe.
- ✓ Adding nutrient, allergen and buying guide information for an Ingredient.
- ✓ Uploading nutrition labels and other documents for an Ingredient.
- ✓ Copying and printing Ingredients and Recipes.
- ✓ Creating a Menu Item.
- ✓ Adding food component contributions for Menu Items.
- ✓ Scaling a Recipe by batch size or number of servings.
- ✓ Creating and maintaining Purchase Items links for Ingredients in the **[Inventory]** module.

Ingredients at a Glance

Menu Function	Description
Ingredients	Add and manage local ingredients with nutrient, allergen, and buying guide information; create menu item with an ingredient; upload nutrition labels and other documents; copy and print ingredient information.
Recipes	Add and manage local Recipes with ingredient, nutrition, and allergen information; scale recipes by batch size or number of servings; find and view USDA and Child Nutrition recipes; add meal pattern food contributions; copy and print recipes.
Menu Items	Find and display Recipes and Ingredients through search of Menu Item details.
Purchase Items	Create links from Ingredients in Menu Planning to items in Inventory for purchasing control.

 **Note:** Menus and functions to which you have access are those appropriate for your role with PrimeroEdge. When you access the **Ingredients** menu, you may see a subset of the functions listed above.

Ingredients



Ingredients allows you to:

- Search for an Ingredient with single or multiple search criteria.
- Add new Ingredients or copy existing Ingredients.
- Maintain Ingredient data.
- Create a Single Ingredient (SI) Recipe.
- Generate an Ingredient List Report for an Ingredient.

Ingredients Page

Ingredients

[Add Ingredient](#)

Ingredient Code: Ingredient Name: Commodity/Recipe Code: Manufacturer/Brand:

Product Code: Stock Item#: Data Source:

Tags: ☐ Include Discontinued Ingredients


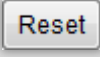
Matching Criteria: ☐ Exact Match ☒ Smart Search

Ingredient Code	Ingredient Name	Ingredient Short Name	Manufacturer	Commodity/Recipe code	Stock Item#	Data Source
9021	Apricots, raw	APRICOTS,RAW				Child Nutrition Database
11697	Arrowroot, raw	ARROWROOT,RAW				Child Nutrition Database
	Artichoke w blue	BRD ARTCK BLUE	SYSO			Child Nutrition Database

By default on the initial **Ingredients** page:

- **Data Source** is set to “ALL”.
- **Smart Search** is enabled (check mark added) to look for the entered string anywhere in the Ingredient name.
- All remaining search conditions are blank or not enabled.

Page Functions

Button/Link	Description
Add Ingredient	Click to display the Quick Ingredients page to enter a name for a new Ingredient.
	Click to display a list of Ingredients that match the selected conditions.
	Click to return all settings in the search condition fields to the default values.

Ingredients List


Column Header	Description
Ingredient Code	Code to identify Ingredient; code may be either automatically assigned by the system, or may be a custom code entered by the user.
Ingredient Name	Complete Ingredient name; name may be either a common name such as “flour”, or the manufacturer’s name, such as “Angel Wings All Purpose Baking Flour”.
Ingredient Short Name	Brief, common name for Ingredient, such as “flour”.
Manufacturer	Name of the Ingredient manufacturer.
Commodity/Recipe Code	USDA or manufacturer’s code, or similar, to identify the ingredient in the USDA/manufacturer’s product offerings.
Stock Item #	Inventory item number.
Data Source	Database in which Ingredient is stored.
Status	Appears only when the Include Discontinued Ingredients option is enabled (check mark added); indicates “inactive” for all discontinued Ingredients.

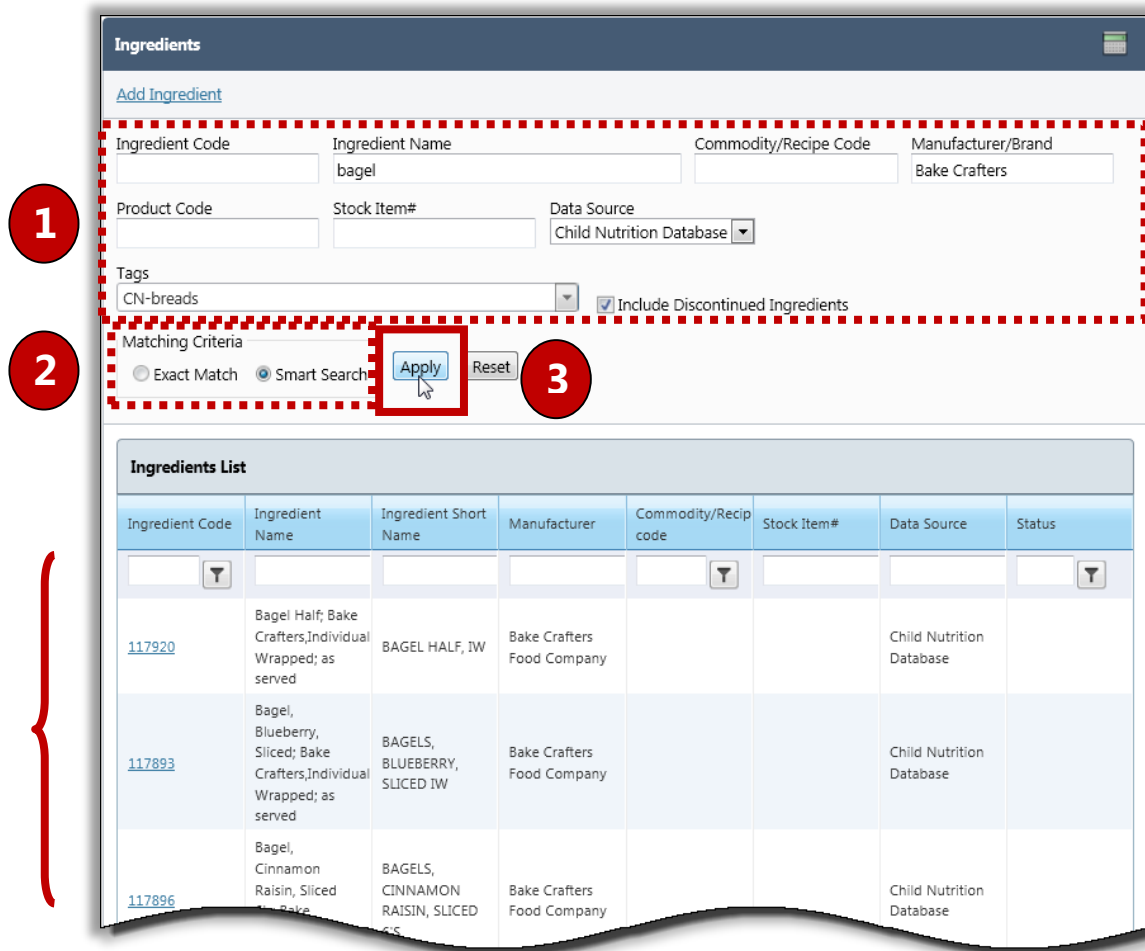
Searching for an Ingredient

Nine separate search conditions can be used to narrow your search for an Ingredient. One of two **Matching Criteria** is selected to tell PrimeroEdge how to use the search conditions in the search:

- **Exact Match** – make only an exact match with the entered text or selected conditions; no variations of text strings will be matched, i.e., applying an Exact Match for “bagel” will not match records with the strings “bagels”, “bagel half”, “sliced bagel”, etc.
- **Smart Search** – make matches with any string that includes the entered string; any variation will be matched, i.e., applying a Smart Search for “bagel” will match records with the strings “bagels”, “bagel half”, “sliced bagel”, etc.

To search for an Ingredient

1. Enter or select one or more search conditions.
2. Choose a **Matching Criteria**.
3. Click .





Ingredients

[Add Ingredient](#)

Ingredient Code: Ingredient Name: Commodity/Recipe Code: Manufacturer/Brand:

Product Code: Stock Item#: Data Source:


Tags: ☐ Include Discontinued Ingredients

Matching Criteria: ☐ Exact Match ☒ Smart Search  


Ingredients List

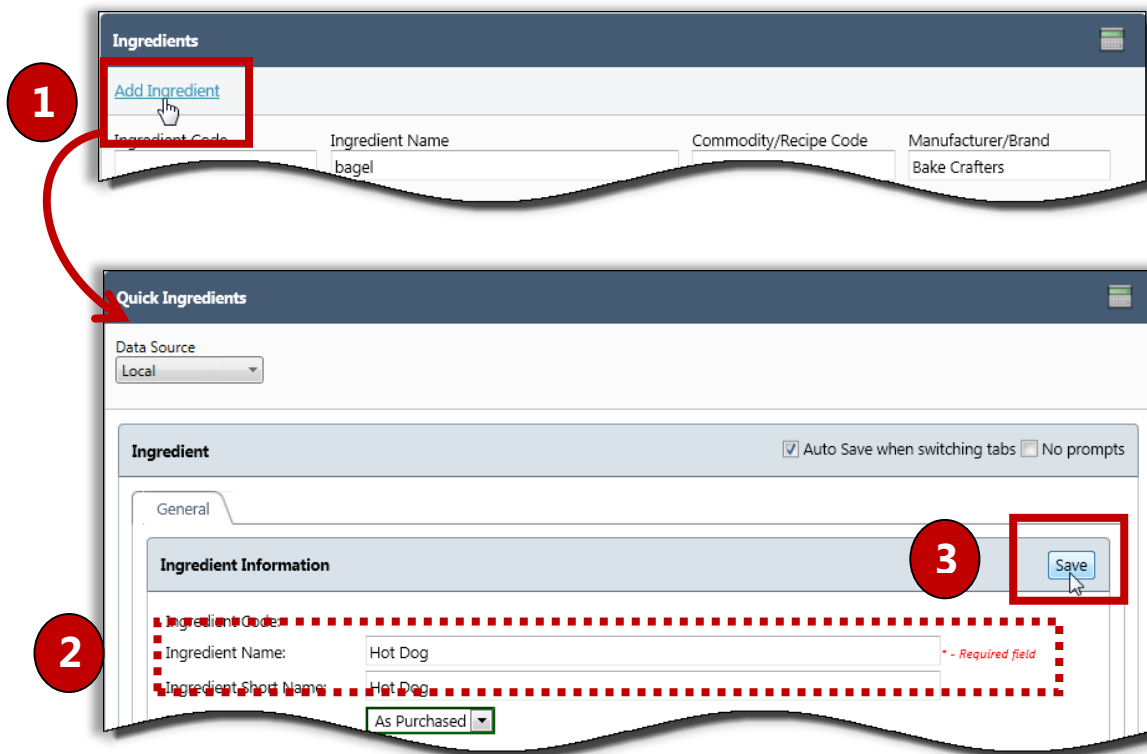
Ingredient Code	Ingredient Name	Ingredient Short Name	Manufacturer	Commodity/Recipe code	Stock Item#	Data Source	Status
117920	Bagel Half; Bake Crafters; Individual Wrapped; as served	BAGEL HALF, IW	Bake Crafters Food Company			Child Nutrition Database	
117893	Bagel, Blueberry, Sliced; Bake Crafters; Individual Wrapped; as served	BAGELS, BLUEBERRY, SLICED IW	Bake Crafters Food Company			Child Nutrition Database	
117896	Bagel, Cinnamon Raisin, Sliced; Bake Crafters; Individual Wrapped; as served	BAGELS, CINNAMON RAISIN, SLICED IW	Bake Crafters Food Company			Child Nutrition Database	

Adding a New Ingredient

To add a new Ingredient, you only need to enter a name for the Ingredient. Clicking  automatically applies an Ingredient Code and marks the ingredient as “Active”. Several new tabs appear on which you will enter data for the new Ingredient.

To add a new ingredient


1. Click the [Add Ingredient](#) link.
2. Enter the Ingredient name and short name.
3. Click .

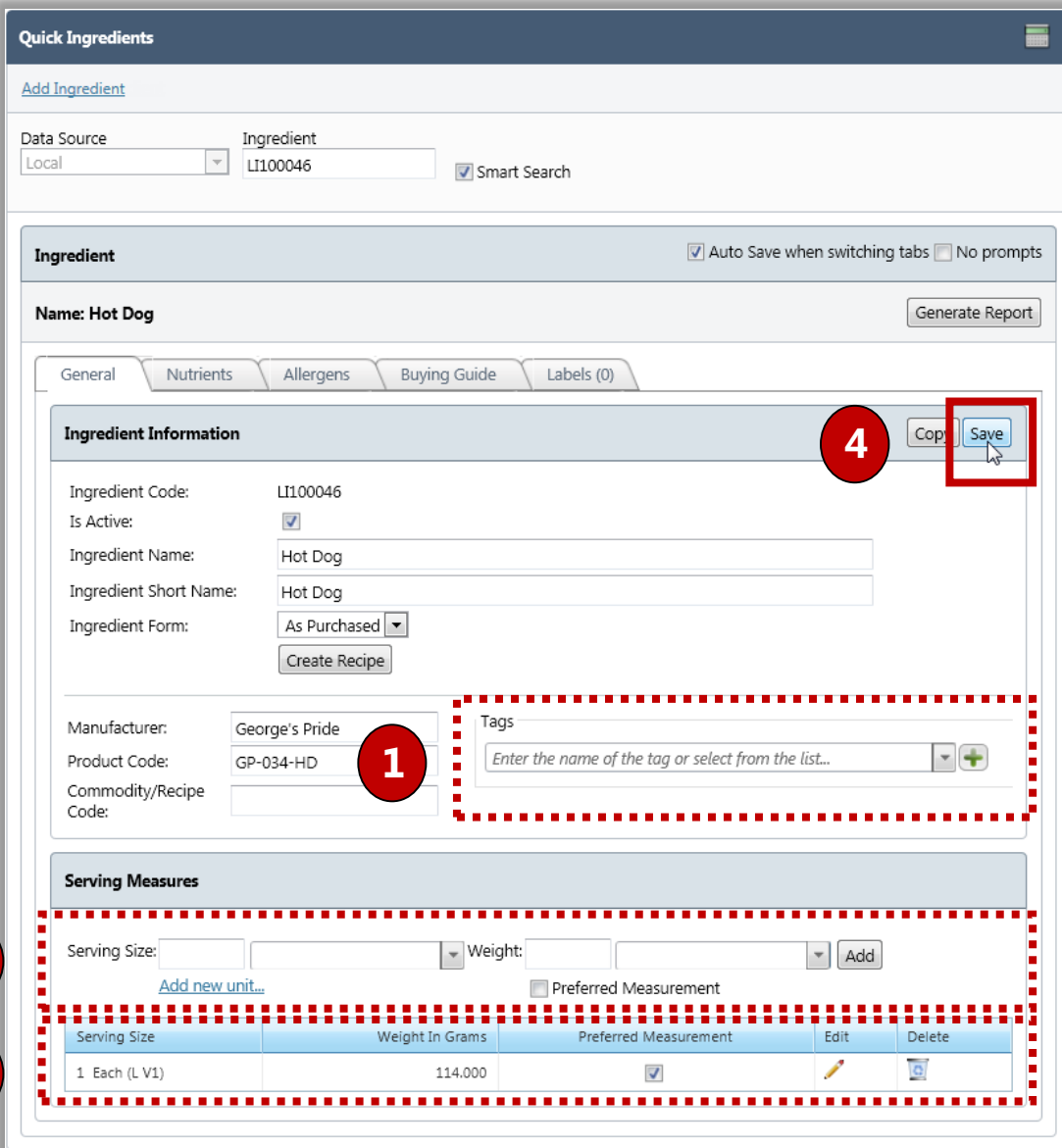


Tab 1: General

The **General** tab includes basic information about the Ingredient, such as the Ingredient Code and Ingredient Name.

To complete the General tab:

1. Create **Tags** to help narrow a search for the ingredient. See Appendix B: Working with PrimeroEdge Tools.
2. Enter **Serving Sizes** for specific Serving Groups.
3. Set the **Preferred Measurement** for the default selection when creating Menu Items.
4. Click  .



Quick Ingredients

[Add Ingredient](#)

Data Source: Ingredient: ☒ Smart Search

Ingredient ☒ Auto Save when switching tabs ☐ No prompts

Name: Hot Dog [Generate Report](#)

General | Nutrients | Allergens | Buying Guide | Labels (0)

Ingredient Information

Ingredient Code: LI100046

Is Active: ☒

Ingredient Name:

Ingredient Short Name:

Ingredient Form: [Create Recipe](#)

Manufacturer: **1**

Product Code:

Commodity/Recipe Code:

Tags: [+](#)

Serving Measures

Serving Size: Weight: [Add](#)

[Add new unit...](#) ☐ Preferred Measurement


Serving Size	Weight In Grams	Preferred Measurement	Edit	Delete
1 Each (L V1)	114.000	<input checked="" type="checkbox"/>	✎	✖

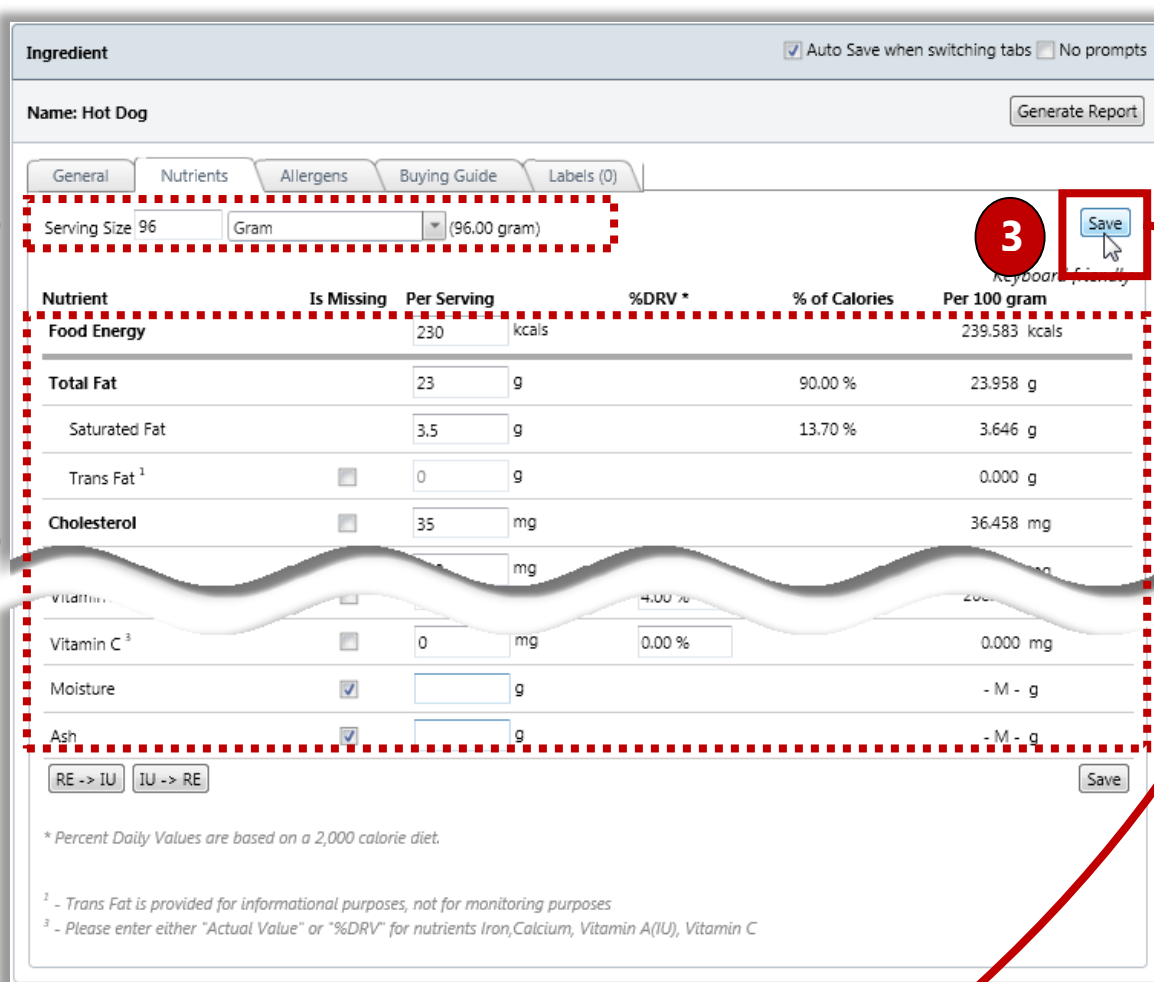
2 **3** **4**

Tab 2: Nutrients

The **Nutrients** tab lists all nutrient values for a set **Serving Size**. These values are used in calculations for various nutritional reports and tools.

To complete the Nutrients tab:

1. Enter a value in **Serving Size**.
2. Enter values in **Per Serving** for each nutrient, selecting **Is Missing** when a value is not provided or available.
3. Click  .



Ingredient Auto Save when switching tabs No prompts

Name: Hot Dog Generate Report

General **Nutrients** Allergens Buying Guide Labels (0)

Serving Size: 96 Gram (96.00 gram)

Nutrient	Is Missing	Per Serving	%DRV *	% of Calories	Per 100 gram
Food Energy		230 kcal			239.583 kcal
Total Fat		23 g		90.00 %	23.958 g
Saturated Fat		3.5 g		13.70 %	3.646 g
Trans Fat ¹	<input type="checkbox"/>	0 g			0.000 g
Cholesterol	<input type="checkbox"/>	35 mg			36.458 mg
Vitamin A ³	<input type="checkbox"/>	0 mg	4.00 %		20.000 mg
Vitamin C ³	<input type="checkbox"/>	0 mg	0.00 %		0.000 mg
Moisture	<input checked="" type="checkbox"/>	g			- M - g
Ash	<input checked="" type="checkbox"/>	g			- M - g

RE -> IU IU -> RE Save

* Percent Daily Values are based on a 2,000 calorie diet.

¹ - Trans Fat is provided for informational purposes, not for monitoring purposes

³ - Please enter either "Actual Value" or "%DRV" for nutrients Iron, Calcium, Vitamin A(IU), Vitamin C

A save success message appears after clicking  .

Nutrients saved successfully.

Tab 3: Allergens

The **Allergens** tab lists all allergens along with an allergen indicator that specifies the allergen level in the Ingredient.

To complete the Allergens tab:

1. Enable each allergen, as needed, and select a corresponding allergen indicator.
2. Click **Save**.

Ingredient Auto Save when switching tabs No prompts

Name: Hot Dog Generate Report

General Nutrients **Allergens** Buying Guide Labels (0)

Allergens

	Allergen Indicator	Allergen	Added By	Added On	Modified By	Modified On
<input type="checkbox"/>	Contains	Milk				
<input checked="" type="checkbox"/>	Processed in a facility tha	Egg				
<input type="checkbox"/>	Contains	Fish				
<input type="checkbox"/>	Contains	Crustacean Shellfish				
<input type="checkbox"/>	Contains	Tree nuts				
<input checked="" type="checkbox"/>	Contains	Wheat				
<input checked="" type="checkbox"/>	May contain	Peanuts				
<input checked="" type="checkbox"/>	Contains	Soy				
<input checked="" type="checkbox"/>	Contains	Gluten				

Save

Allergens saved successfully.


Tab 4: Buying Guide

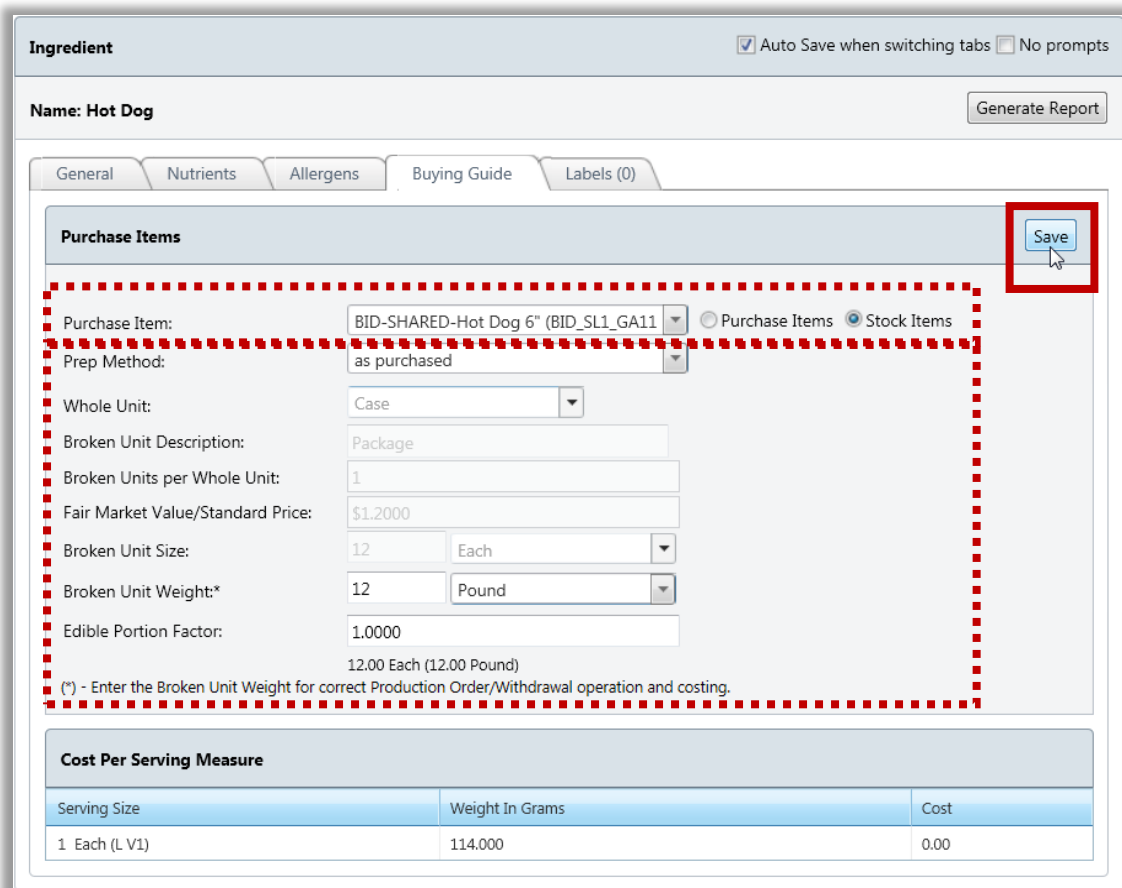
The **Buying Guide** tab provides information on how the ingredient is obtained.

- If your district uses the PrimeroEdge **[Inventory]** module, Ingredients in the **[Menu Planning]** module can be linked to a *stock item* maintained in inventory.
- If your district does not use the PrimeroEdge **[Inventory]** module, *purchase items* are created for each Ingredient.

Note: You must enter either a **Broken Unit Weight** or **Edible Portion** value when using the PrimeroEdge **[Production]** and **[Inventory]** modules with the **[Menu Planning]** module so that correct processing of items occurs.

To complete the Buying Guide tab:

1. Enable either **Purchase Items** or **Stock Items**, and select an item from the drop-down list.
2. For the remaining fields:
 - For **Stock Items**, several fields are completed for you. Select a **Prep Method** and **Broken Unit Weight**, and enter the **Edible Portion Factor**.
 - For **Purchase Items**, select or enter data for each field.
3. Click  .



The screenshot shows the 'Buying Guide' tab for the ingredient 'Hot Dog'. The 'Purchase Items' section is highlighted with a red dashed border. A red box highlights the 'Save' button in the top right corner of the 'Purchase Items' section. The 'Purchase Item' dropdown is set to 'BID-SHARED-Hot Dog 6" (BID_SL1_GA11)'. The 'Prep Method' is 'as purchased'. The 'Whole Unit' is 'Case'. The 'Broken Unit Description' is 'Package'. The 'Broken Units per Whole Unit' is '1'. The 'Fair Market Value/Standard Price' is '\$1.2000'. The 'Broken Unit Size' is '12' and 'Each'. The 'Broken Unit Weight*' is '12' and 'Pound'. The 'Edible Portion Factor' is '1.0000'. Below the 'Purchase Items' section, there is a 'Cost Per Serving Measure' table.

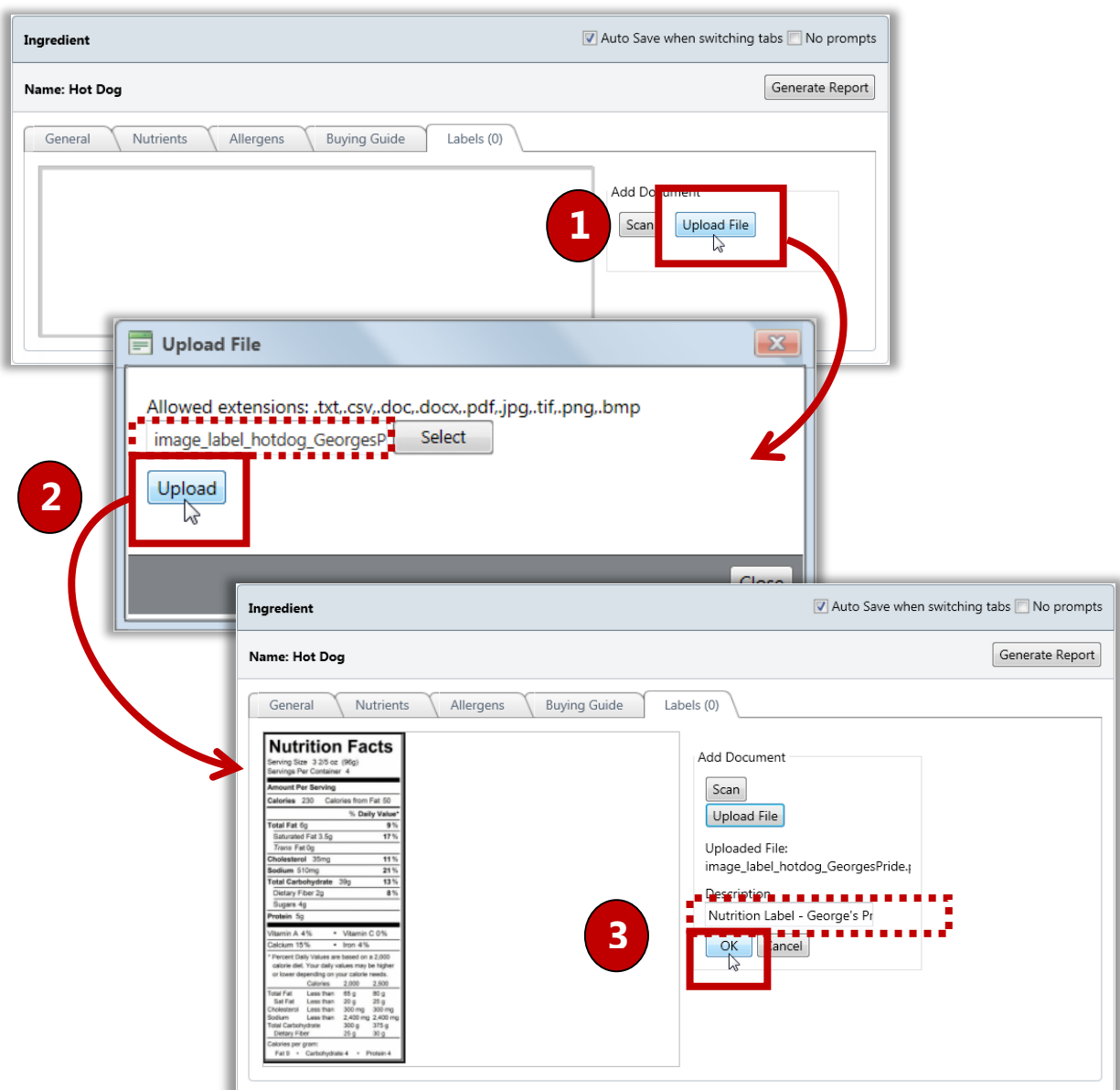
Serving Size	Weight In Grams	Cost
1 Each (L V1)	114.000	0.00

Tab 5: Labels

The **Labels** tab allows you to upload nutrition label images, product images, or other files, such as word processing documents, spreadsheets, and more, to provide supporting documentation.

To add a label


1. Click **Upload File** and select a file.
2. Click **Upload**.
3. Enter a name for the file and click **OK**.

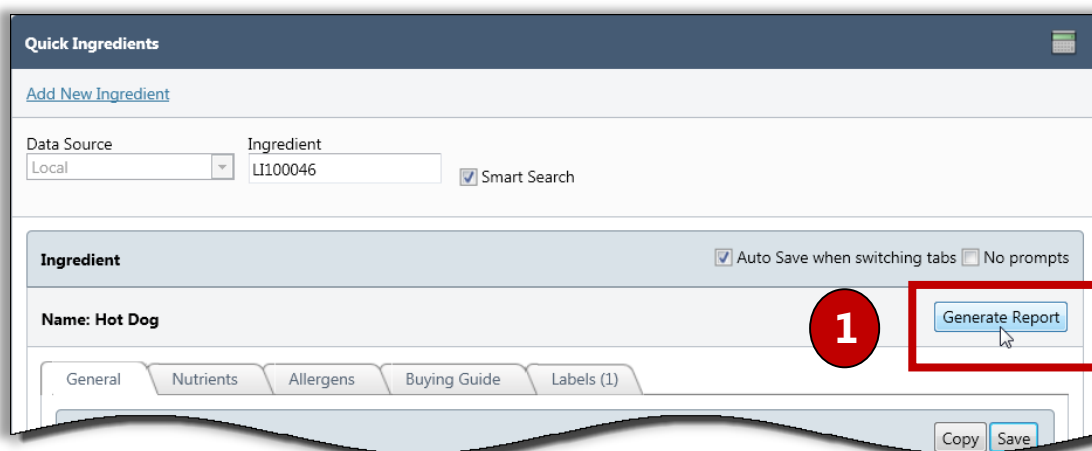


Generating an Ingredient List Report

The Ingredient List report includes the Ingredient Name, Ingredient Code, all serving measurements, and nutrients values per serving and per 100 grams.

To generate an Ingredient List report:

1. Click **Generate Report**.
2. Click **Print** () on the report viewer toolbar.



Quick Ingredients

[Add New Ingredient](#)

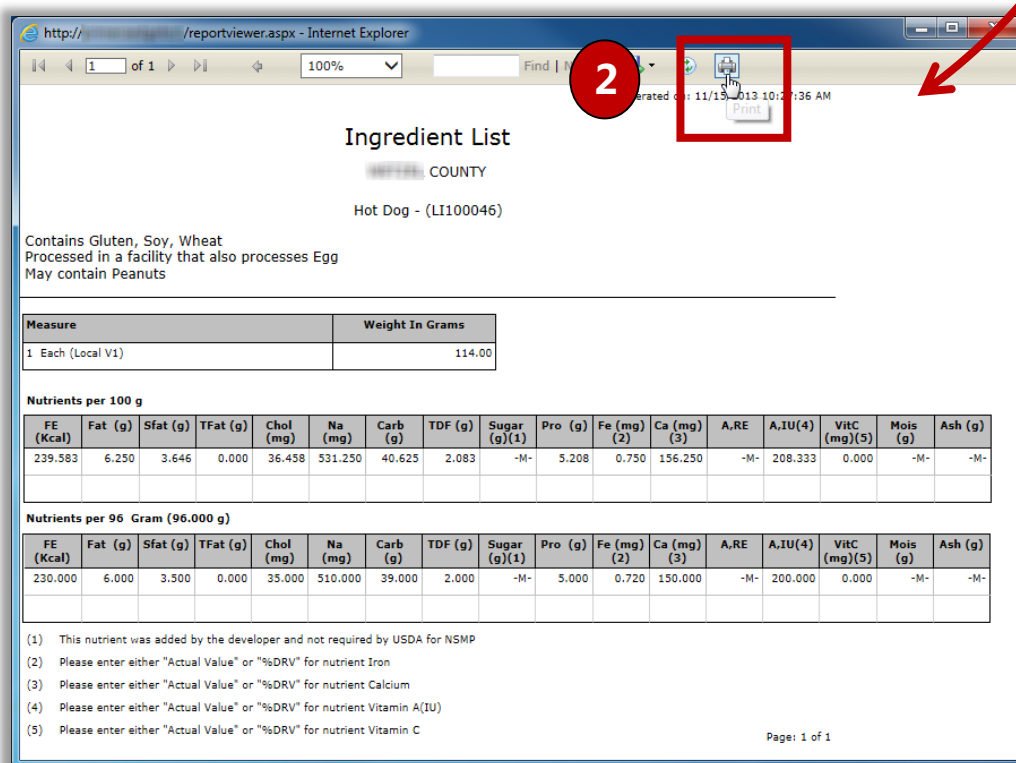
Data Source: Local Ingredient: LI100046 ☒ Smart Search

Ingredient ☒ Auto Save when switching tabs ☐ No prompts

Name: Hot Dog

General | **Nutrients** | Allergens | Buying Guide | Labels (1)

Copy Save



http://.../reportviewer.aspx - Internet Explorer

1 of 1 100% Find |

Generated on: 11/15/2013 10:27:36 AM

Ingredient List

COUNTY

Hot Dog - (LI100046)

Contains Gluten, Soy, Wheat
Processed in a facility that also processes Egg
May contain Peanuts

Measure	Weight In Grams
1 Each (Local V1)	114.00

Nutrients per 100 g

FE (Kcal)	Fat (g)	Sfat (g)	TFat (g)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)(1)	Pro (g)	Fe (mg) (2)	Ca (mg) (3)	A,RE (g)	A,IU(4)	VitC (mg)(5)	Mois (g)	Ash (g)
239.583	6.250	3.646	0.000	36.458	531.250	40.625	2.083	-M-	5.208	0.750	156.250	-M-	208.333	0.000	-M-	-M-

Nutrients per 96 Gram (96.000 g)

FE (Kcal)	Fat (g)	Sfat (g)	TFat (g)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)(1)	Pro (g)	Fe (mg) (2)	Ca (mg) (3)	A,RE (g)	A,IU(4)	VitC (mg)(5)	Mois (g)	Ash (g)
230.000	6.000	3.500	0.000	35.000	510.000	39.000	2.000	-M-	5.000	0.720	150.000	-M-	200.000	0.000	-M-	-M-

(1) This nutrient was added by the developer and not required by USDA for NSMP
(2) Please enter either "Actual Value" or "%DRV" for nutrient Iron
(3) Please enter either "Actual Value" or "%DRV" for nutrient Calcium
(4) Please enter either "Actual Value" or "%DRV" for nutrient Vitamin A(IU)
(5) Please enter either "Actual Value" or "%DRV" for nutrient Vitamin C

Page: 1 of 1

Creating a Recipe from a Single Ingredient

To set up a purchased item as a Menu Item, the purchased item is 1) added as an ingredient, and then, 2) a recipe is created with the Ingredient. Two new tabs appear, **Recipe** and **Menu Item** which allow you to set up the new ingredient/recipe as a Menu Item (see **Section 2: Recipes** for information on these tabs). This type of recipe is called a “Single Ingredient (SI) recipe.”

To create a Single Ingredient recipe:

1. Click **Create Recipe**.
2. Enter recipe information such as **Prep Time**, **HACCP Process**, **Tips**, and instructions.
3. Click **Save**.

The screenshot displays the 'Ingredient' form for 'Hot Dog'. The 'Ingredient Information' section includes fields for Ingredient Code (LI100046), Is Active (checked), Ingredient Name (Hot Dog), Ingredient Short Name (Hot Dog), and Ingredient Form (As Purchased). A red circle with the number '1' highlights the 'Create Recipe' button.

Below this, a red dashed box encloses the recipe details section, which includes:

- Calculated Weight Per Serving: (blank)
- Prep Time: 25 minutes
- HACCP Process: Same day service
- HACCP CCP table:

	CCP	Critical Limit	Corrective Action
<input checked="" type="checkbox"/>	Cook	Heat to = 165.00 °F for 15 seconds	Continue cooking food until the internal temperature reaches the required temperature.
<input checked="" type="checkbox"/>	Hot Hold	Hold at >= 135.00 °F	Discard the food if it cannot be determined how long the food temperature was below 135 °F

Below the table are sections for Tips/Comments, Pre-Preparation Instructions (Hot dog must be par-boiled before cooking in oven), and Serving Instructions. A red circle with the number '2' is placed to the left of this section.

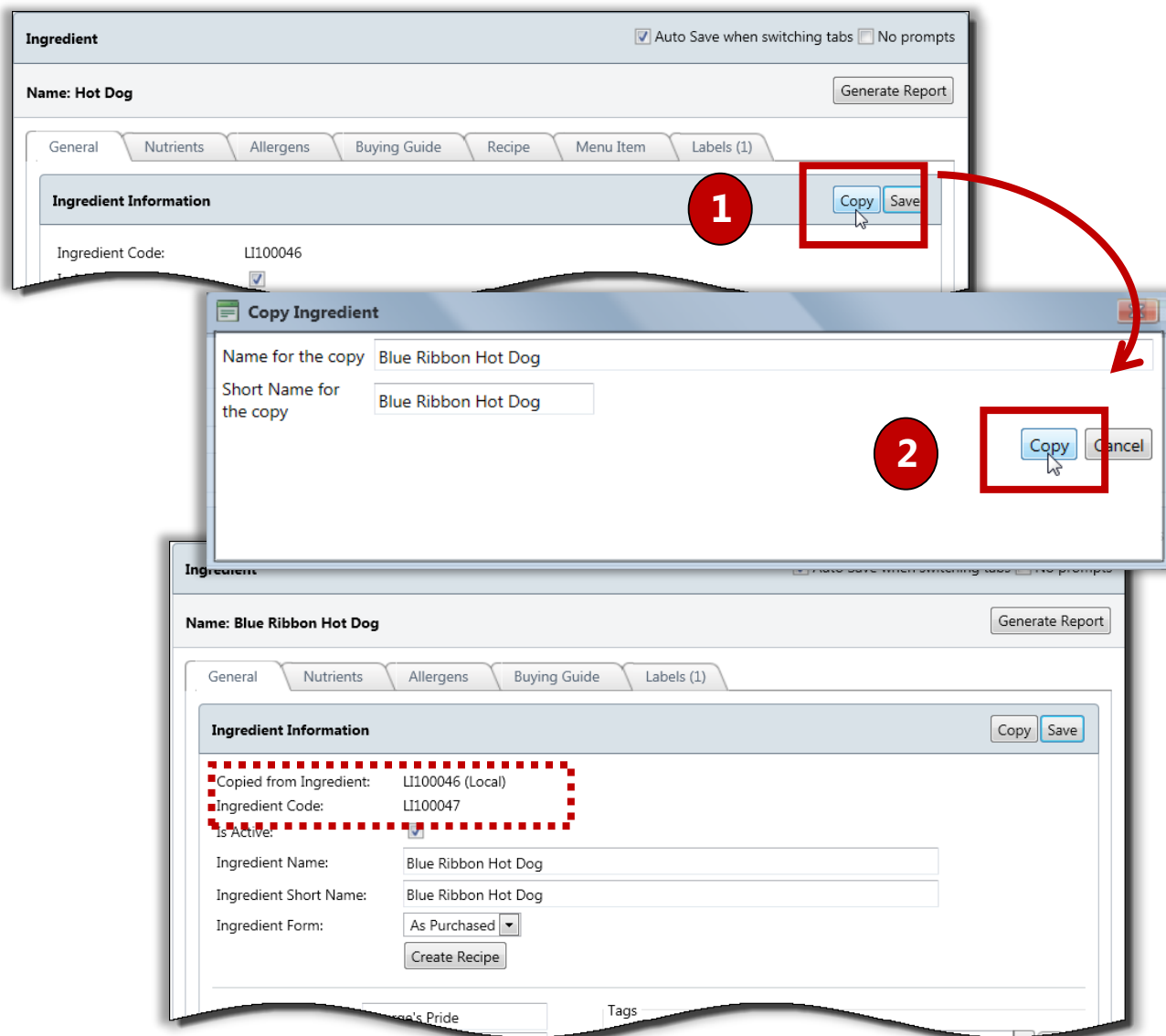
At the bottom right, a red circle with the number '3' highlights the 'Save' button.

Copying an Ingredient

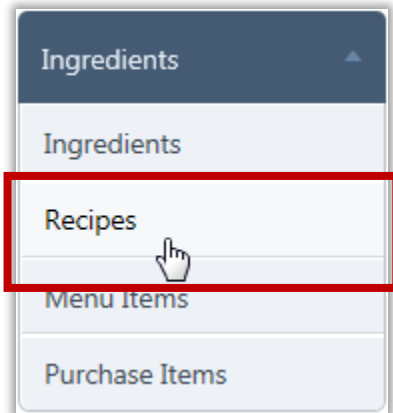
When copying any Ingredient, you will enter a name and a short name for the copied Ingredient. PrimeroEdge automatically creates the Ingredient Code (based on **Recipes – Auto Generate Recipe Codes** system setting). The original Ingredient is listed on the **General** tab above the copied Ingredient code.

To copy an Ingredient:

1. Click **Copy**.
2. Enter a name for the copy and click **Copy**.



Recipes



Recipes allows you to:

- Search for a Recipe using single or multiple search criteria.
- Add new Recipes or copy existing Recipes.
- Maintain Recipe data.
- Create Menu Items with a Recipe.
- Generate a Nutrition Report (nutrient data) for a Recipe.
- Generate a Recipe Report (all Recipe data).
- Scale a Recipe by batch or by servings.

Recipes Page



 The screenshot shows the 'Recipes' page interface. At the top, there's a header 'Recipes' with a small icon. Below it is a link 'Add Recipe'. The main section is titled 'Recipe Search Criteria' and contains several input fields: 'Recipe Code', 'Recipe Name', a checkbox for 'Include Discontinued Recipes', a 'Tags' field with a placeholder 'Enter the tag names separated by a ;', and a 'Data Source' dropdown menu currently set to '-- ALL --'. Below these is an 'Ingredient' field with a checked 'Smart Search' checkbox. At the bottom of the search section are 'Matching Criteria' with radio buttons for 'Exact Match' and 'Smart Search' (selected), and 'Apply' and 'Reset' buttons. Below the search section is a 'Recipe List' table. The table has columns: 'Recipe Code', 'Name', 'Serving Size', 'Type', 'Number of Servings', and 'Source'. The first row shows a recipe with code 'LR300008', name 'Apples, dried, sulfured, uncooked', serving size '1 CN-Ring', type 'Single Ingredient', 1 serving, and source 'Cybersoft'. The second row shows 'Applesauce Cake C-03' with 50 servings and source 'Cybersoft'.

By default on the **Recipes** page:

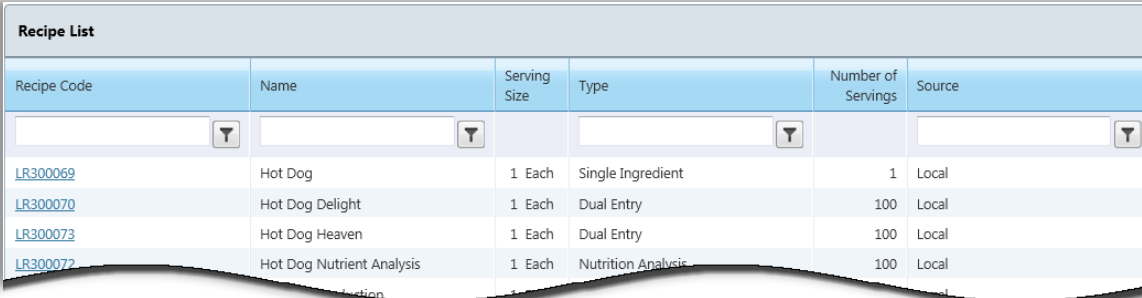
- **Data Source** is set to “ALL”.
- **Smart Search** is enabled (check mark added) for **Ingredient**.
- **Matching Criteria** is set to “**Smart Search**”

By default all **active** recipes that meet the search criteria are included in the search results. To also include **inactive** recipes in the search results, enable the **Include Discontinued Recipes** option (add check mark).

Page Functions

Button/Link	Description
Add Recipe	Click to display the Quick Recipes page to enter a name for a new Recipe.
	Click to display all Recipe records in the Recipe List that match the set search conditions.
	Click to return all search criteria fields to the default settings.

Recipe List Listings



Recipe Code	Name	Serving Size	Type	Number of Servings	Source
LR300069	Hot Dog	1 Each	Single Ingredient	1	Local
LR300070	Hot Dog Delight	1 Each	Dual Entry	100	Local
LR300073	Hot Dog Heaven	1 Each	Dual Entry	100	Local
LR300072	Hot Dog Nutrient Analysis	1 Each	Nutrition Analysis	100	Local


Column Header	Description
Recipe Code	Code assigned when the Recipe is created
Name	Recipe Name
Serving Size	Preferred serving measurement
Type	<p>Recipe type can be one of the following:</p> <ul style="list-style-type: none"> ▪ Nutrition Analysis – uses Ingredients set up in [Menu Planning] ▪ Production – uses Purchase Items which are Ingredients linked to Inventory items in the [Inventory] module ▪ Dual Entry – uses Ingredients and/or Purchase Items ▪ Single Ingredient – includes only one ingredient; this type of recipe is usually created from purchased items that are served as is, such as a “bagel”
Number of Servings	Number of servings made with one iteration of the recipe
Source	Database (Data Source) in which the Recipe is stored

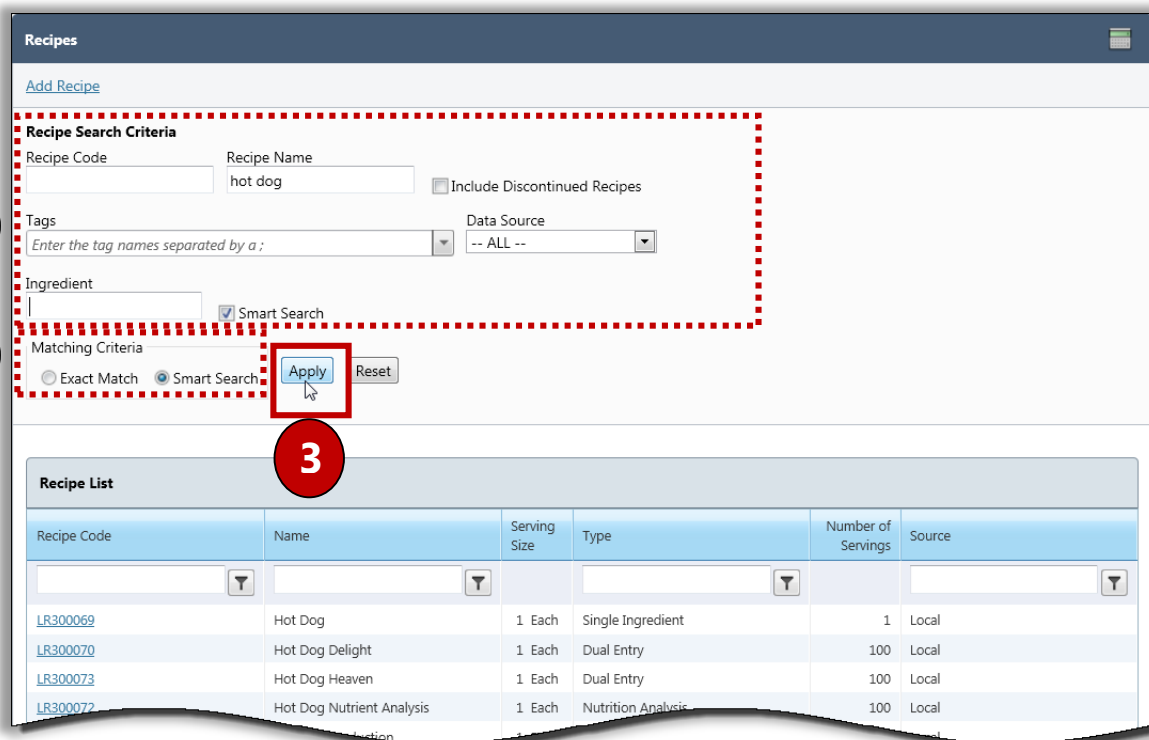
Searching for a Recipe

Seven separate search conditions can be used to narrow your search for a Recipe. One **Matching Criteria** option is selected to tell PrimeroEdge how to use the search conditions in the search:

- **Exact Match** – make only an exact match with the entered text or selected conditions; no variations of text strings will be matched, i.e., applying an Exact Match for “bagel” will not match records with the strings “bagels”, “bagel half”, “sliced bagel”, etc.
- **Smart Search** – make matches with any string that includes the entered string; any variation will be matched, i.e., applying a Smart Search for “bagel” will match records with the strings “bagels”, “bagel half”, “sliced bagel”, etc.

To search for a Recipe

1. Enter or select one or more search conditions.
2. Choose a **Matching Criteria**.
3. Click  .



Recipe Search Criteria

Recipe Code: Recipe Name: ☐ Include Discontinued Recipes

Tags: Data Source:

Ingredient: ☒ Smart Search

Matching Criteria: ☐ Exact Match ☒ Smart Search

Recipe List

Recipe Code	Name	Serving Size	Type	Number of Servings	Source
LR300069	Hot Dog	1 Each	Single Ingredient	1	Local
LR300070	Hot Dog Delight	1 Each	Dual Entry	100	Local
LR300073	Hot Dog Heaven	1 Each	Dual Entry	100	Local
LR300072	Hot Dog Nutrient Analysis	1 Each	Nutrition Analysis	100	Local

Adding a New Recipe

Three types of recipes can be added:

- Nutrition Analysis – allows for selection of Ingredients set up in the **[Menu Planning]** module.
- Production – allows for selection of Purchase Items set up in the **[Inventory]** module.
- Dual Entry – allows for selection of either a Purchase Item or an Ingredient when adding Ingredients/Steps to the recipe.

To add a new Recipe

1. Click the [Add Recipe](#) link.
2. Select the **Data Source**, if needed/available.
3. Select the **Recipe Generation Type** and enter the **Recipe Name**, **Serving Size**, and **Number of Servings** on the **General** tab.
4. Click [Save](#).

The image consists of two screenshots from the PrimoEdge Menu Planning application, illustrating the steps to add a new recipe. Red circles with numbers 1 through 4 are placed over the interface elements, with red arrows indicating the flow from step 1 to step 2.

Step 1: The first screenshot shows the 'Recipes' section of the application. The 'Add Recipe' link is highlighted with a red box and a red circle labeled '1'. Below this, the 'Recipe Search Criteria' section is visible, including fields for 'Recipe Code', 'Recipe Name', and a checkbox for 'Include Discontinued Recipes'. There are also 'Tags' and 'Data Source' dropdown menus.

Step 2: The second screenshot shows the 'Quick Recipes' section. The 'Data Source' dropdown menu is highlighted with a red dashed box and a red circle labeled '2'. The dropdown is currently set to 'Local'.

Step 3: The 'Recipe' form is shown, with the 'General' tab selected. The 'Recipe Information' section is highlighted with a red dashed box and a red circle labeled '3'. This section includes the following fields:

- Recipe Generation Type:** A dropdown menu currently set to 'Dual Entry'.
- Recipe Name:** A text input field containing 'Hot Dog Delight'.
- Recipe Short Name:** An empty text input field.
- Recipe Code:** A text input field with the placeholder text 'Auto generated on save'.
- Serving Size:** A text input field with '1' and a unit dropdown menu set to 'Each'.
- Number of Servings:** A text input field with '100.00'.

Step 4: The 'Save' button is highlighted with a red box and a red circle labeled '4'. The button is located at the bottom right of the 'Recipe Information' section.

Tab 1: General

Several additional fields appear on the **General** tab after saving to collect general recipe details.

To complete the General tab

1. Set up **Tags**, if needed.
2. Enter **Prep Time** and **Cook Time**, and select a **HACCP Process**.
3. Enter **Tips**, **Comments** or **Special Instructions**, as needed.
4. Click **Save**.

Recipe ☒ Auto Save when switching tabs ☐ No prompts

Name: Hot Dog Delight Generate Report

General Ingredients Nutrients Menu Item Allergens Scale

Recipe Information Copy Save

Is Active: ☒

Recipe Code: LR300076

Tags: Enter the name of the tag or select from the list... +

CN-Beef (11)
Meat / Meat Alternate (2)

Each

Calculated Weight: 50,000 grams

Prep Time: 15 minutes

Cook Time: 7 minutes

HACCP Process: Same day service

HACCP CCP: ☒ Specify CCPs for the entire recipe ☐ Specify CCPs for each step

CCP	Critical Limit	Corrective Action
<input checked="" type="checkbox"/> Cook	Heat to = 165.00 °F for 15 seconds	Continue cooking food until the internal temperature reaches the required temperature.

Tips/Comments:

Waste: +/-

4 Save

Tab 2: Ingredients

The **Ingredients** tab lists all recipe Ingredients and all steps used in the recipe. An image of the Ingredient can be uploaded and then displayed on the Ingredients tab by setting the [Recipes – Display Pictures in Recipes](#) system setting.

To add an ingredient/step:

1. Click the [Add Step](#) link.
2. Select a **Purchase Item** or **Ingredient** and enter the **Quantity** needed.
3. Enter **Directions**.
4. Click [Apply](#).

Recipe Auto Save when switching tabs No prompts

Name: Hot Dog Delight Generate Report

General Ingredients Nutrients Menu Item Allergens Scale

Steps

#	Picture	Stock Item#	Purchase Item	Cost	Ingredient	Directions	PI WIG	WIG	DOR	Delete
No records to display.										

[Add Step](#)

Purchase Item Only: ☐ Ingredient Only: ☐

Purchase Item: Home Run Hot Dog Buns Ingredient: LI100048 ☒ Smart Search

Prep Method: as purchased

Quantity: 100 Roll

Edible Portion Factor: 1

Ingredient Name: Hot Dog Buns

100.000 Roll

Image: [Click to enlarge](#)

Directions:

1. Open roll.
2. Place roll on baking sheet

☒ Display on Record

[Apply](#) [Cancel](#)

Upload Picture

Uploaded File: image_hotdogs.png

Recipe Costing Information

Total Recipe Cost: 0.0000

Number of Servings: 100.000000

Serving Size: 1 Each (L V1)

Cost Per Serving: 0.0000

Notes on Selecting a Purchase Item or Ingredient.

If you create Nutrition Analysis Recipes, the **Ingredients** tab appears similar to the image below. Ingredients for each step are selected from the list of all ingredients set up in PrimeroEdge **[Menu Planning]**.

Two records to display

[Add Step](#)

Ingredient Only: ☒

Ingredient:

LI100048 ... ☒ Smart Search

Ingredient Name:

Hot Dog Buns

100 Roll (L V1)

Image: [Click to enlarge](#)

Directions:

1. Open roll.
2. Place roll on baking sheet.

If you create Production Recipes, the **Ingredients** tab appears similar to the image below. Purchase Items for each Recipe step are selected. Purchase Items are items stored in the PrimeroEdge **[Inventory]** module. Ingredients in the **[Menu Planning]** module are linked to inventory items in the **[Inventory]** module through the **Purchase Items** menu selection. The **Ingredients** tab provides **Recipe Costing Information** based on the item's pricing information stored in the **[Inventory]** module.

[Add Step](#)

Purchase Item Only: ☐

Purchase Item: Home Run Hot Dog Buns

Prep Method: as purchased

Quantity: 100 Roll

Image:


Directions:

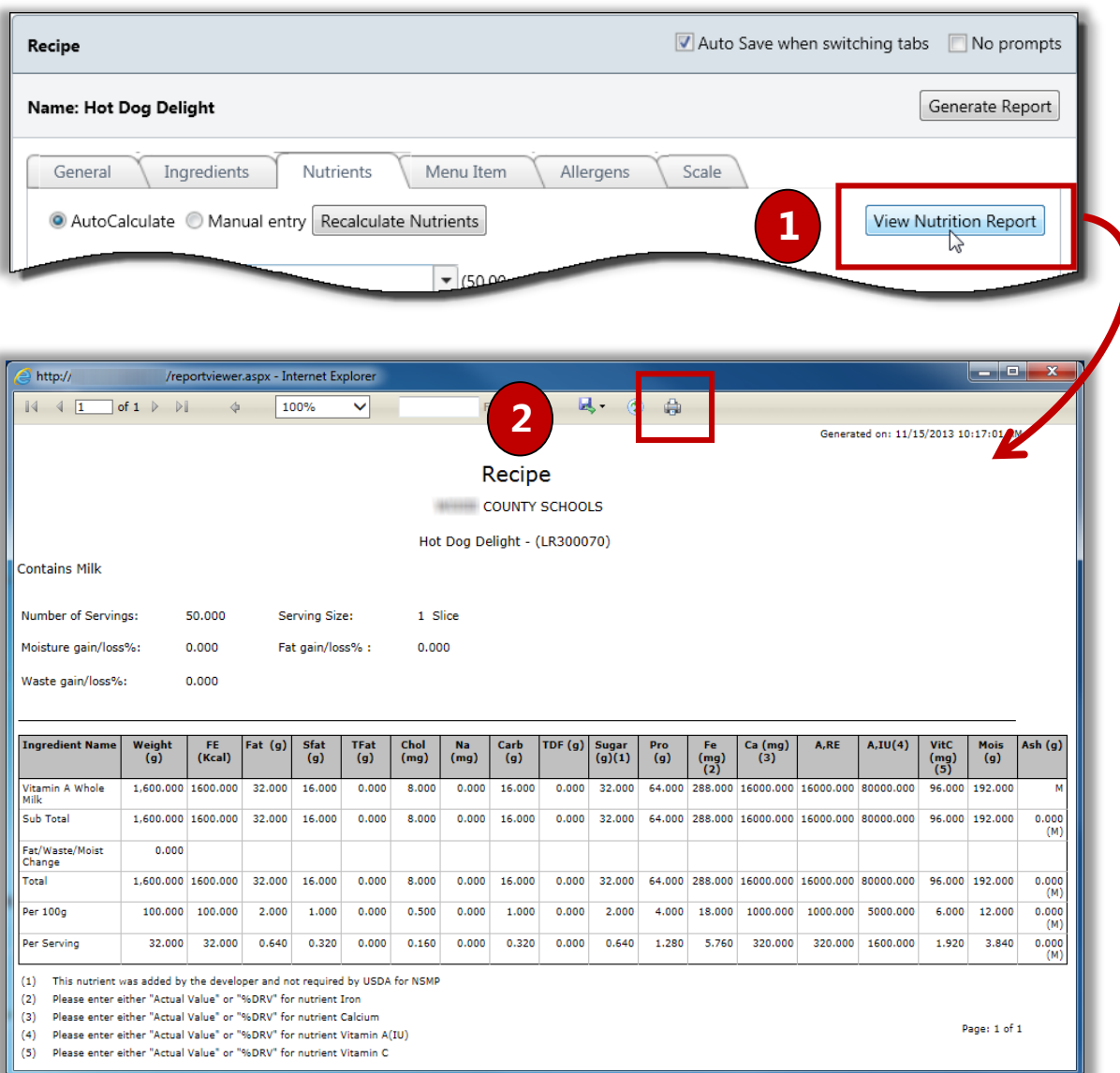
The **Ingredients** tab image shown on the previous page appears when you create a “Dual Entry” recipe type where you can select either a Purchase Item or an Ingredient.

Tab 3: Nutrients

The **Nutrients** tab displays nutrient information totals for all ingredients used in the recipe. By default, calculation of recipe nutrient information is set to “**AutoCalculate**”. Any change to the recipe, such as changing ingredients or serving sizes, automatically triggers an automatic recalculation of total nutrient values.

To view and print a recipe Nutrition Report

1. Click **View Nutrition Report**.
2. Click **Print** () on the window toolbar.



Recipe Auto Save when switching tabs No prompts

Name: Hot Dog Delight Generate Report

General Ingredients **Nutrients** Menu Item Allergens Scale

☒ AutoCalculate ☐ Manual entry Recalculate Nutrients

1 View Nutrition Report

http:// /reportviewer.aspx - Internet Explorer

2 Print

Generated on: 11/15/2013 10:17:01 AM

Recipe

COUNTY SCHOOLS

Hot Dog Delight - (LR300070)

Contains Milk

Number of Servings: 50.000 Serving Size: 1 Slice

Moisture gain/loss%: 0.000 Fat gain/loss%: 0.000


Waste gain/loss%: 0.000

Ingredient Name	Weight (g)	FE (Kcal)	Fat (g)	Sfat (g)	TFat (g)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)	Pro (g)	Fe (mg)	Ca (mg)	A,RE	A,IU(4)	VitC (mg)	Mois (g)	Ash (g)
Vitamin A Whole Milk	1,600.000	1600.000	32.000	16.000	0.000	8.000	0.000	16.000	0.000	32.000	64.000	288.000	16000.000	16000.000	80000.000	96.000	192.000	M
Sub Total	1,600.000	1600.000	32.000	16.000	0.000	8.000	0.000	16.000	0.000	32.000	64.000	288.000	16000.000	16000.000	80000.000	96.000	192.000	0.000 (M)
Fat/Waste/Moist Change	0.000																	
Total	1,600.000	1600.000	32.000	16.000	0.000	8.000	0.000	16.000	0.000	32.000	64.000	288.000	16000.000	16000.000	80000.000	96.000	192.000	0.000 (M)
Per 100g	100.000	100.000	2.000	1.000	0.000	0.500	0.000	1.000	0.000	2.000	4.000	18.000	1000.000	1000.000	5000.000	6.000	12.000	0.000 (M)
Per Serving	32.000	32.000	0.640	0.320	0.000	0.160	0.000	0.320	0.000	0.640	1.280	5.760	320.000	320.000	1600.000	1.920	3.840	0.000 (M)

(1) This nutrient was added by the developer and not required by USDA for NSMP
 (2) Please enter either "Actual Value" or "%DRV" for nutrient Iron
 (3) Please enter either "Actual Value" or "%DRV" for nutrient Calcium
 (4) Please enter either "Actual Value" or "%DRV" for nutrient Vitamin A(IU)
 (5) Please enter either "Actual Value" or "%DRV" for nutrient Vitamin C

Page: 1 of 1

To manually enter nutrient values

1. Click “Manual entry”.
2. Enter nutrient values in **Per Serving** or select the **Is Missing** option when values are not available.
3. Click .

Recipe Auto Save when switching tabs No prompts

Name: Hot Dog Delight Generate Report

General Ingredients **Nutrients** Menu Item Allergens Scale

1 Calculate Manual entry View Nutrition Report

Serving Size 1 Each (50.00 gram) Save

Nutrient	Is Missing	Per Serving	%DRV *	% of Calories	Keyboard friendly Per 100 gram
Food Energy		360 kcals			720.000 kcals
Total Fat		16 g		40.00 %	32.000 g
Saturated Fat		1.5 g		3.75 %	3.000 g
Trans Fat ¹	<input type="checkbox"/>	0 g			0.000 g
Cholesterol	<input type="checkbox"/>	70 mg			140.000 mg
Sodium	<input type="checkbox"/>	480 mg			960.000 mg
Carbohydrate		53 g		58.89 %	106.000 g
Total Dietary Fiber	<input type="checkbox"/>	3 g			6.000 g
Protein		6 g		6.67 %	12.000 g
Iron ³	<input type="checkbox"/>	1.44 mg	8.00 %		2.880 mg
Calcium ³	<input type="checkbox"/>	0.00 mg	0.00 %		0.000 mg
Vitamin A (RE)	<input checked="" type="checkbox"/>				- M - RE
Vitamin A (IU) ³	<input type="checkbox"/>	100.00 IU	2.00 %		200.000 IU
Vitamin C ³	<input type="checkbox"/>	1.2 mg	2.00		2.400 mg
Moisture	<input checked="" type="checkbox"/>				- M - g
Ash	<input checked="" type="checkbox"/>				- M - g

RE -> IU IU -> RE

2 Save


3

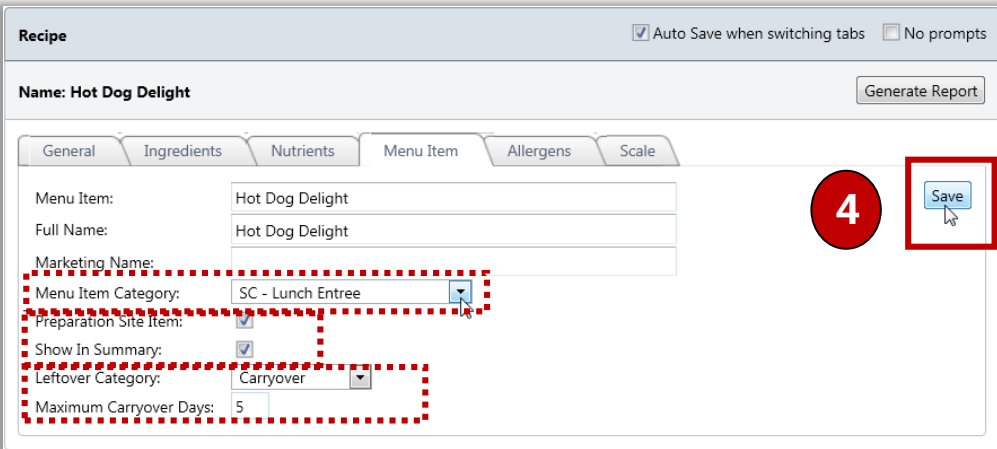
2,000 calorie diet.

Tab 4: Menu Item

A Menu Item is created from a recipe. One or more Menu Items are placed on Menus.

To create a Menu Item

1. Select a **Menu Item Category**.
2. Enable options as needed.
 - **Preparation Site Item** – when the Menu Item is to be produced by a Preparation site.
 - **Show In Summary** – when only the Menu Item name is to be shown on the **Menu Calendar** report when the **Show Summary Items Only** option is selected on the **Menu Calendar** page; also specifies to show the item in the “month” calendar view in ParentOnline – this controls the amount of information shown for large menus.
3. Select a **Leftover Category**; enter the **Maximum Carryover Days** if “Carryover” is selected; a default maximum number of Carryover Days can be set through the [Menu Items – Default Maximum Carryover Days](#) system setting.
4. Click  .



Recipe Auto Save when switching tabs No prompts

Name: Hot Dog Delight Generate Report

General Ingredients Nutrients **Menu Item** Allergens Scale

Menu Item: Hot Dog Delight

Full Name: Hot Dog Delight

Marketing Name:


Menu Item Category: SC - Lunch Entree

Preparation Site Item:


Show In Summary: ☒

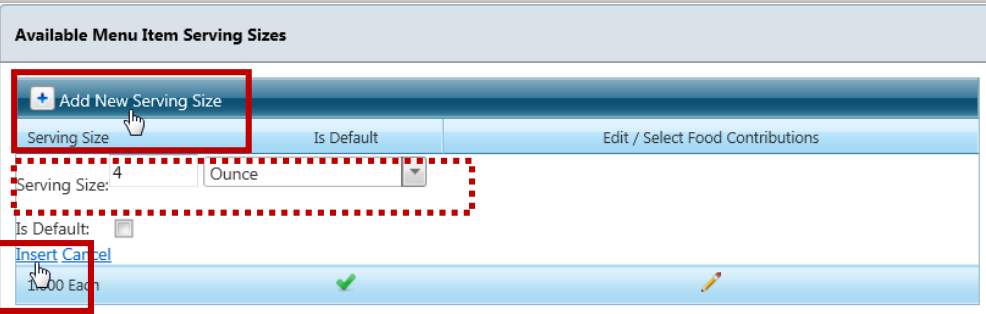
Leftover Category: Carryover

Maximum Carryover Days: 5


4 

To add an available Menu Item serving size:

1. Click  .
2. Enter a **Serving Size** and select a serving measurement.
3. Click the [Insert](#) link.




Available Menu Item Serving Sizes

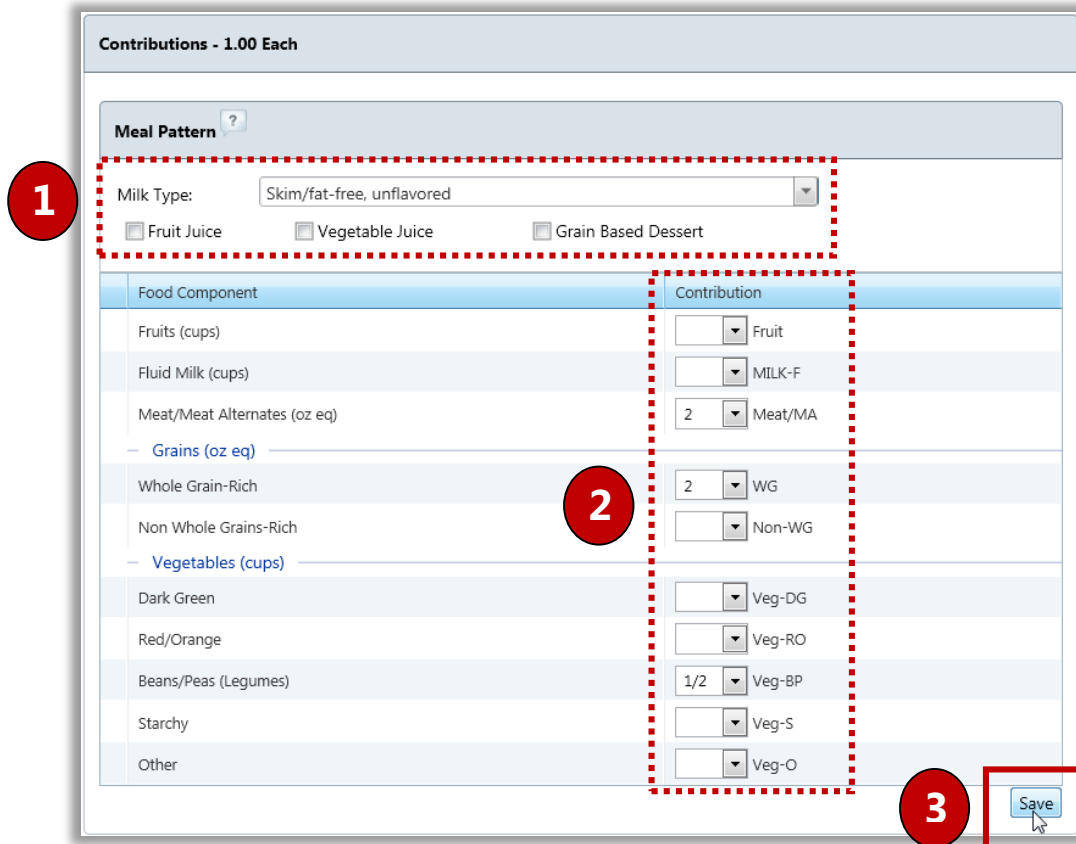


Serving Size	Is Default	Edit / Select Food Contributions
Serving Size: 4 Ounce	<input type="checkbox"/>	Insert Cancel

3 [Insert](#)

To add food component contributions:

1. Select a **Milk Type**, and enable juice and dessert options if appropriate.
2. Select contribution values for each food component provided by the Menu Item.
3. Click .




Contributions - 1.00 Each

Meal Pattern ?


Milk Type:

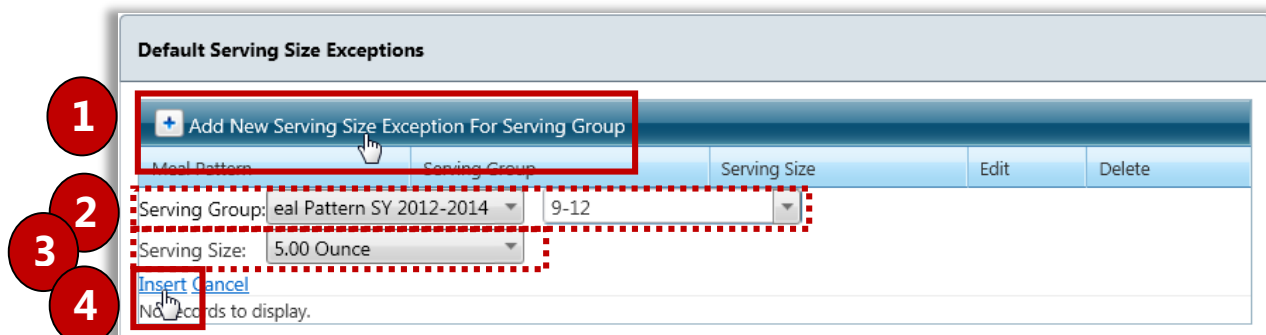
☐ Fruit Juice ☐ Vegetable Juice ☐ Grain Based Dessert

Food Component	Contribution
Fruits (cups)	<input type="text" value=""/> Fruit
Fluid Milk (cups)	<input type="text" value=""/> MILK-F
Meat/Meat Alternates (oz eq)	2 <input type="text" value=""/> Meat/MA
Grains (oz eq)	
Whole Grain-Rich	2 <input type="text" value=""/> WG
Non Whole Grains-Rich	<input type="text" value=""/> Non-WG
Vegetables (cups)	
Dark Green	<input type="text" value=""/> Veg-DG
Red/Orange	<input type="text" value=""/> Veg-RO
Beans/Peas (Legumes)	1/2 <input type="text" value=""/> Veg-BP
Starchy	<input type="text" value=""/> Veg-S
Other	<input type="text" value=""/> Veg-O




To add a serving size exception:

1. Click .
2. Select a **Meal Pattern** and **Group** for **Serving Group**.
3. Select a **Serving Size**.
4. Click the [Insert](#) link.



Default Serving Size Exceptions



Meal Pattern	Serving Group	Serving Size	Edit	Delete
	Meal Pattern SY 2012-2014	9-12		
	Serving Group: 5.00 Ounce			

[Insert](#) [Cancel](#)

No records to display.

Tab 5: Allergens

The **Allergens** tab reflects all allergens listed for each ingredient used in the recipe. This information is read-only. To change allergen information, you must update the **Allergens** tab for individual ingredients.

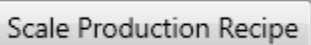
The screenshot shows the 'Recipe' window for 'Hot Dog Delight'. The 'Allergens' tab is selected. It displays a table with three columns: Indicator, Allergen, and Source(s).

Indicator	Allergen	Source(s)
Contains	Egg	Hot Dog Buns (#LI100048)
Contains	Wheat	Hot Dog Buns (#LI100048)
Contains	Gluten	Hot Dog Buns (#LI100048)

Tab 6: Scale

Recipes can be scaled by number of batches or by servings. The Scale Recipe by Batch report lists recipe details, stock item/ingredient details, instructions, HACCP processes and nutritional information. Scale Recipe by Servings report lists stock item/ingredient details, pre-prep and serving instructions, and HACCP processes.

To scale a Production recipe by Batch:

1. Select the number of batches.
2. Click .

The screenshot shows the 'Recipe' window for 'Hot Dog Delight' with the 'Scale' tab selected. The 'Scale Recipe By Batch' section is highlighted with a red dashed box and a red circle with the number 1. The 'Scale Production Recipe' button is highlighted with a red solid box and a red circle with the number 2. The 'Custom Scale Recipe' section shows 'Standardize to: 100 servings of 1 Each'.

To scale a recipe by servings

1. Enter number of servings and select the serving measure in **Standardize to:**
2. Click **Scale Recipe**.

http://.../reportviewer.aspx - Internet Explorer


Generated on: 11/15/2013 10:35:23 AM

Hot Dog Delight (LR300070)

COUNTY

Contains Egg, Gluten, Wheat
Processed in a facility that also processes Milk, Soy
May contain Crustacean Shellfish

Number of Servings:	400	Serving Size:	1 Each
Moisture gain/loss%:	0.0000	Yield:	44 Pound, 1 1/2 Ounce
Waste gain/loss%:	0.0000	Fat gain/loss% :	0.0000

Stock Item#	Stock Item	Stock Quantity	Ingredient Name	Quantity	Picture
SS-TSB-3925	Home Run Hot Dog Buns , as purchased	400 Roll	Hot Dog Buns LI100048	400 Roll	

Pre-Preparation Instructions

- Franks must be par-boiled.

Serving Instructions

- Condiments are served in packets.

Preparation Instructions

- 1. Open roll.
- 2. Place roll on baking sheet.

CCP Name	CCP Description	Critical Temperature	Corrective Action
Cook	Cooking	165.00	Continue cooking food until the internal temperature reaches the required temperature.

Nutritional Information

	Fat	SFat	Carb	Protein	Sugar
% of Calories	40.00	3.75	58.89	6.67	(M)

Nutrients per 100 g

FE (Kcal)	Fat (g)	Sfat (g)
720.000	32.000	3.000

Scale Recipe by Servings

Scale Production Recipe by Batch

http://.../reportviewer.aspx - Internet Explorer

Generated on: 11/15/2013 10:44:34 AM

LR300070 - Hot Dog Delight

COUNTY


Scaled for 400(1 Each) servings

Contains Egg, Gluten, Wheat
Processed in a facility that also processes Milk, Soy
May contain Crustacean Shellfish

(1) This nutrient was added
(2) Please enter either "Actual"
(3) Please enter either "Actual"
(4) Please enter either "Actual"
(5) Please enter either "Actual"

Pre-Preparation Instructions

- Franks must be par-boiled.

Stock Item# / Recipe Code	Stock Item / Recipe Name	Stock Quantity	Directions	Picture
SS-TSB-3925	Home Run Hot Dog Buns , as purchased	400 Roll	1. Open roll. 2. Place roll on baking sheet.	

Serving Instructions

- Condiments are served in packets.

CCP Name	CCP Description	Critical Temperature	Corrective Action
Cook	Cooking	165.00	Continue cooking food until the internal temperature reaches the required temperature.

Copying a Recipe

Recipes can be copied as often as needed. This is convenient when you have similar recipes that include “tweaks”. Copying the recipe and then making changes where needed is much faster than re-entering the entire recipe.

The copied recipe includes all data from the original recipe *except* for the **Menu Item** tab.

To copy a recipe:

1. Display the **General** tab.
2. Click **Copy**.
3. Enter a name and a short name for the copy and click **Copy**.

Recipe

☒ Auto Save when switching tabs ☐ No prompts

Name: Hot Dog Delight Generate Report

General Ingredients Nutrients Menu Item Allergens Scale

Recipe Information 1 Copy Save

Copy Recipe

Name for the copy Hot Dog Heaven

Short Name for the copy Hot Dog Heaven

2 Copy Cancel 3

Recipe

☒ Auto Save when switching tabs ☐ No prompts

Name: Hot Dog Heaven Generate Report

General Ingredients Nutrients Menu Item Allergens Scale

Recipe Information Copy Save

Is Active: ☒

3 Copied from Recipe: LR300070 (Local) 3

Recipe Generation Type: Dual Entry

Recipe Name: Hot Dog Heaven


Recipe Short Name: Hot Dog Heaven

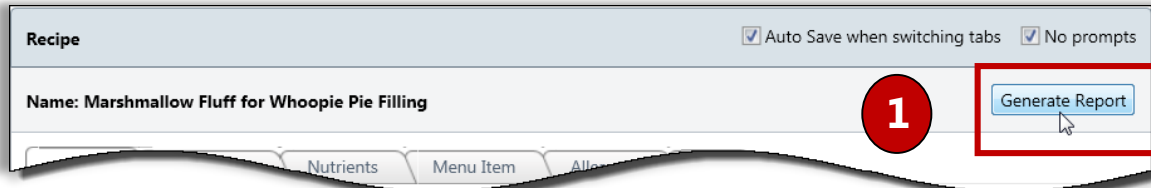
Recipe Code: LR300073

Tags

Generating a Recipe Report




To generate and print a recipe report

1. Click **Generate Report** in the **Recipe** header.
2. Click **Print** () on the window toolbar.



The screenshot shows a web browser window displaying the reportviewer.aspx page. The title bar indicates the URL is http://.../reportviewer.aspx - Internet Explorer. The page title is 'Marshmallow Fluff for Whoopie Pie Filling (LK100216)'. Below the title, it says 'COUNTY SCHOOLS'. The report contains the following information:

Number of Servings: 32 Serving Size: 4 CN-tablespoon
 Moisture gain/loss%: 0.0000 Yield: 1 Pound, 3 1/2 Ounce
 Waste gain/loss%: 0.0000 Fat gain/loss%: 0.0000

Stock Item#	Stock Item	Stock Quantity	Ingredient Name	Quantity	Picture
			Toppings, marshmallow cream 19365	8 Ounce	
			Butter, print unsalted, 36/1 lb., land o'lakes, as purchased 110630	3 tablespoon	
			Confectioner's Sugar L1100157	10 Ounce	

Preparation Instructions

- Place 2 cups (8 ounces) of marshmallow cream in large mixing bowl.
- Place 3 TBSP of unsalted butter in large bowl with marshmallow cream.
- Place 2.5 cups of confectioners sugar in large bowl with first two ingredients.
- Beat all ingredients together for 5 minutes until light and smooth in consistency.

Nutritional Information

	Fat	Sfat	Carb	Protein	Sugar
% of Calories	29.41	21.08	69.56	0.71	0.000

Nutrients per 100 g

FE (Kcal)	Fat (g)	Sfat (g)	TFat (g)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)(1)	Pro (g)	Fe (mg) (2)	Ca (mg) (3)	A,RE	A,IU(4)	VitC (mg)(5)	Mois (g)	Ash (g)
186.548	6.095	4.369	Missing	16.293	32.852	32.440	0.041	Missing	0.330	0.093	1.234	43.455	217.685	0.000	9.595	0.197

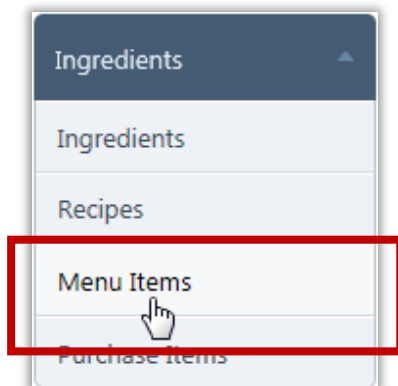
Nutrients per serving (17.259 g)

FE (Kcal)	Fat (g)	Sfat (g)	TFat (g)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)(1)	Pro (g)	Fe (mg) (2)	Ca (mg) (3)	A,RE	A,IU(4)	VitC (mg)(5)	Mois (g)	Ash (g)
32.197	1.052	0.754	Missing	2.812	5.670	5.599	0.007	Missing	0.057	0.016	0.213	7.500	37.571	0.000	1.656	0.034

(1) This nutrient was added by the developer and not required by USDA for NSMP
 (2) Please enter either "Actual Value" or "%DRV" for nutrient Iron
 (3) Please enter either "Actual Value" or "%DRV" for nutrient Calcium
 (4) Please enter either "Actual Value" or "%DRV" for nutrient Vitamin A(IU)
 (5) Please enter either "Actual Value" or "%DRV" for nutrient Vitamin C

Page: 1 of 1

Menu Items



Menu Items searches for menu items by menu item Name (Full Name and Short Name), Category, Ingredient Code, and/or Recipe Code and tags.

Ingredient Code and Recipe Code searches build a smart list of items that match the search string(s) as you enter them.

When search results are listed, the **General** tab or **Menu Item** tab of the **Recipe** page can be accessed through the links provided from a menu item listing.

Menu Item particulars

- Menu Items can be made inactive (discontinued).
- To include inactive Menu Items in search results, the **Include Discontinued Menu Items** option must be selected.
- An active Menu Item can include inactive Ingredients.
- An inactive Menu Item can be added to a Menu.

Menu Items Page

Menu Items

Menu Item: Category: Ingredient Code: ☒ Smart Search

Recipe Code: ☒ Smart Search ☐ Include discontinued Menu Items.

Enter the name of the tag or select from the list...

Category	Menu Item	Recipe Code	Ingredient Code	Serving Size	Meal Contribution	Allergens	Data Source
	Burrito, Bean & Cheese, Individually Wrapped, Fernando's School		117572		1 1/2 WG 2 Meat/MA		Local
SC - Fruit	SC-Grapefruit	LR300025	LI100025	1 CN-grape	1 1/2 Fruit		Local
SC - Milk	SC-Low Fat Milk, Unflavored	LR300021	LI100030	8 Ounce	1 MILK-F	Contains Milk	Local
SC - Milk	SC-Skim Milk, Unflavored	LR300022	LI100031	1 Cup	1 MILK-F		Local



Page size: 10 7 items in 1 pages

By default on the **Menu Items** page:

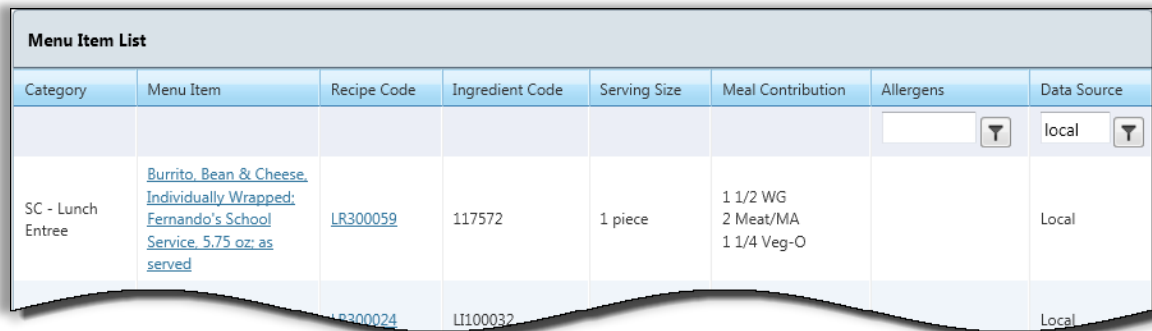
- **Category** is set to "ALL".

- **Menu Item, Ingredient Code, Recipe Code** and **[Tags]** are blank.
- **Ingredient Code Smart Search** and **Recipe Smart Search** are selected.
- **Include Discontinued Menu Items** is cleared.
- All **active** menu items are displayed in the **Menu Item List**.

Page Functions

Button/Link	Description
	Click to display all Menu Item records in the Menu Item List that match the set search conditions.
	Click to return all search criteria fields to the default settings.

Menu Item List Listings



Category	Menu Item	Recipe Code	Ingredient Code	Serving Size	Meal Contribution	Allergens	Data Source
SC - Lunch Entree	Burrito, Bean & Cheese, Individually Wrapped, Fernando's School Service, 5.75 oz, as served	LR300059	117572	1 piece	1 1/2 WG 2 Meat/MA 1 1/4 Veg-O		Local
		LR300024	LI100032				Local

Column Header	Data Type	Description
Category	<i>View only</i>	<i>Sortable</i> ; category to which the menu item is assigned
Menu Item	Clickable link	<i>Sortable</i> ; click to display the Menu Item tab of the recipe that the menu item is associated with
Recipe Code	Clickable link	<i>Sortable</i> ; click to display the General tab of the recipe that the menu item is associated with
Ingredient Code	<i>View only</i>	<i>Sortable</i> ; single-ingredient recipe code
Serving Size	<i>View only</i>	Lists the preferred serving size and measurement for the Menu Item
Meal Contributions	<i>View only</i>	Lists all food components contributed by the Menu Item to a meal
Allergens	<i>View only</i>	<i>Sortable</i> ; all allergens associated with the menu item
Data Source	<i>View only</i>	<i>Sortable</i> ; data location (database) of recipe associated with the menu item


Searching for a Menu Item

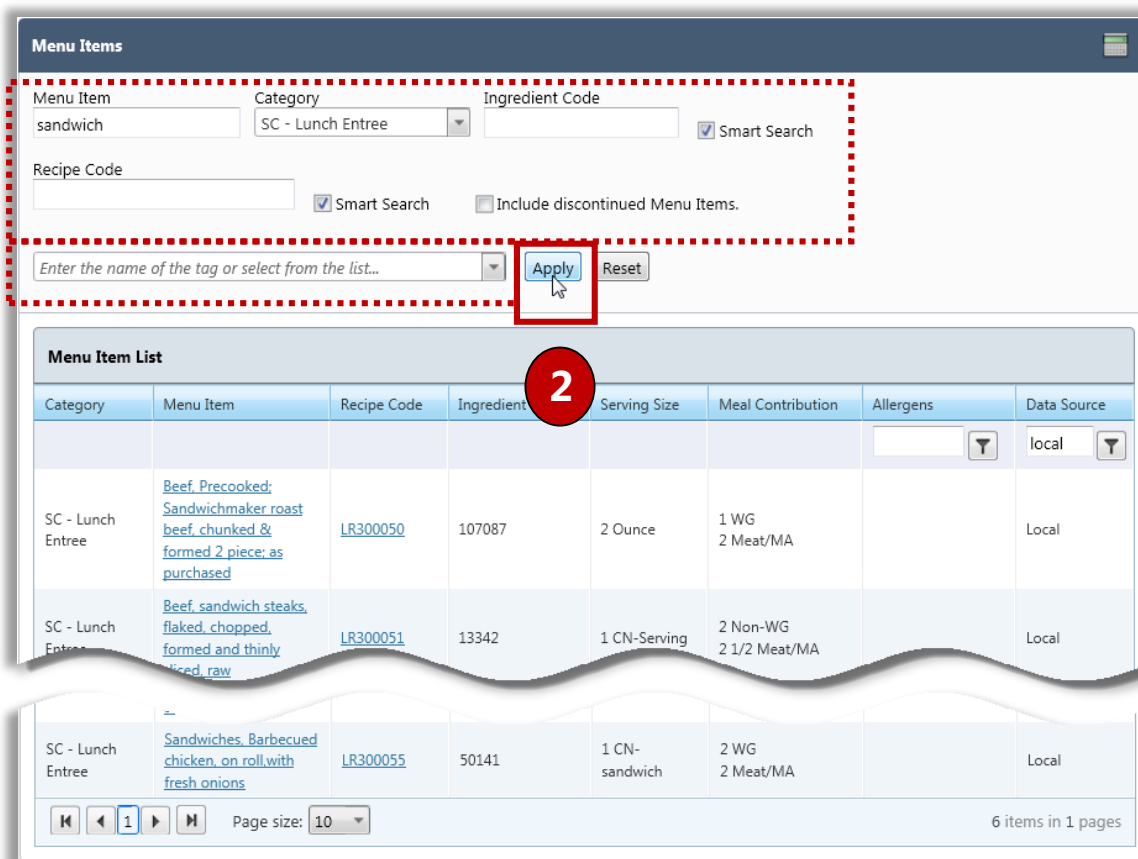
A search for a Menu Item can include five different search criteria. In addition, **Ingredient Code** and **Recipe Code** can be set to use Smart Search or Exact Search methods. Clearing the **Smart Search** option sets the search method to Exact Search.

- **Exact Match** – make only an exact match with the entered text or selected conditions; no variations of text strings will be matched, i.e., applying an Exact Match for “bagel” will not match records with the strings “bagels”, “bagel half”, “sliced bagel”, etc.
- **Smart Search** – make matches with any string that includes the entered string; any variation will be matched, i.e., applying a Smart Search for “bagel” will match records with the strings “bagels”, “bagel half”, “sliced bagel”, etc.

By default, all **active** Menu Items that meet the search criteria are listed in the search results. To include inactive Menu Items, enable the **Include discontinued Menu Items** option (add check mark).

To search for a Menu Item:



1. Enter one or more search criteria.
2. Click .



Menu Items

Menu Item: sandwich Category: SC - Lunch Entree Ingredient Code: ☒ Smart Search

Recipe Code: ☒ Smart Search ☐ Include discontinued Menu Items.

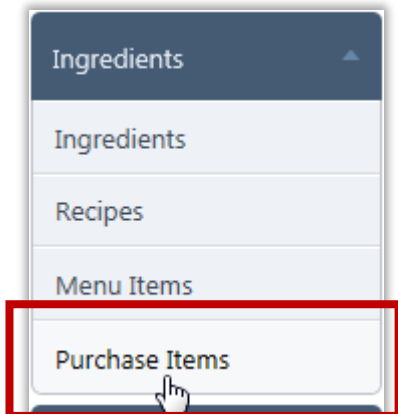
Enter the name of the tag or select from the list...  

Menu Item List

Category	Menu Item	Recipe Code	Ingredient	Serving Size	Meal Contribution	Allergens	Data Source
SC - Lunch Entree	Beef, Precooked; Sandwichmaker roast beef, chunked & formed 2 piece; as purchased	LR300050	107087	2 Ounce	1 WG 2 Meat/MA		Local
SC - Lunch Entree	Beef, sandwich steaks, flaked, chopped, formed and thinly sliced, raw	LR300051	13342	1 CN-Serving	2 Non-WG 2 1/2 Meat/MA		Local
SC - Lunch Entree	Sandwiches, Barbecued chicken, on roll with fresh onions	LR300055	50141	1 CN-sandwich	2 WG 2 Meat/MA		Local

Page size: 10 6 items in 1 pages

Purchase Items



Purchase Items are automatically populated with Inventory items, if your district is using the **[Inventory]** module.

When the **[Inventory]** module is used in conjunction with the **[Menu Planning]** module, a Purchase Item can be linked to an Inventory item to support ordering of Recipe ingredients through a common purchasing system.

When the **[Inventory]** module is not used, Purchase Items are added manually and provide recipe costing information through input of “Fair Market Value/Standard Price” for each item.

Purchase Items Page

Purchase Items

Data Source: Local

Purchase Items

[Add new record](#)


Description	DataSource	Whole Unit	Broken Unit	Broken Unit Size	Broken Unit Weight	Broken Units per Whole Unit	Fair Market Value/Standard Price	Stock Item
> 1% MILK, 8 OZ CARTON	Local	Carton	each	8.0000 ounce	8.000000 ounce	1	\$0.28	1% MILK, 8 OZ CARTON
> 1% MILK, GALLON	Local	gallon	quart	1.0000 quart		4	\$4.15	1% MILK, GALLON
> ALMONDS, SLICED, NATURAL	Local	Case	bag	1.0000 pound	1.000000 pound	2	\$12.08	ALMONDS, SLICED, NATURAL
> ANIMAL CRACKERS	Local	Case	Package	1.0000 ounce	1.000000 ounce	100	\$11.44	ANIMAL CRACKERS
> APPLES Red Delicious	Local	Case	POUND	1.0000 pound	1.000000 pound	40	\$25.47	APPLES Red Delicious
> APPLES, SLICED, CANNED(106003)	Local	Case	Can	1.0000 no. 10 can		6	\$25.98	APPLES, SLICED, CANNED(106003)
> APPLES, SLICED, SOLID PACK(206008)	Local	Case	CAN	1.0000 Can	100.000000 ounce	6	\$31.88	APPLES, SLICED, SOLID PACK(206008)
> APPLES SAUCE(206010)	Local	Case	no. 10 can	104.0000 ounce	104.000000 ounce	6	\$19.73	APPLES SAUCE(206010)
> APRICOTS CUPS, FRZ	Local	Case	Cup	4.5000 ounce	4.500000 ounce	96	\$31.41	APRICOTS CUPS, FRZ
> ASIAN BASE SAUCE	Local	Case	Bag	5.0000 pound	5.000000 pound	4	\$32.00	ASIAN BASE SAUCE

Page size: 10

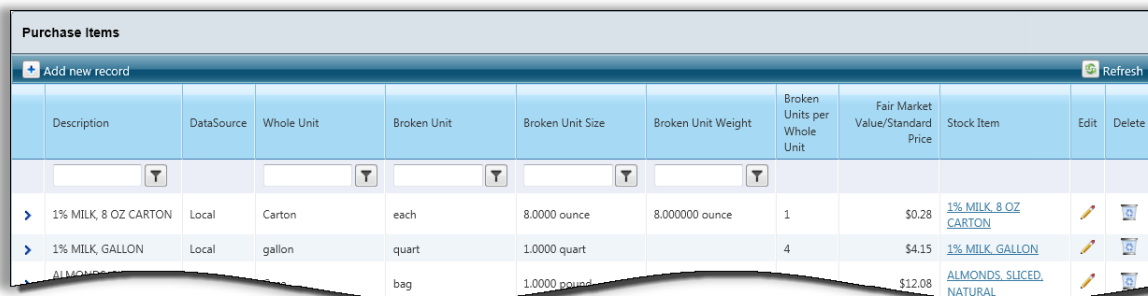
By default on the **Purchase Items** page:







- **Data Source** is set to “local”.



Page Functions

Button/Link	Description
	Click to display all recipe records in the Recipe List that match the set search conditions.

Purchase Items Listings




Description	DataSource	Whole Unit	Broken Unit	Broken Unit Size	Broken Unit Weight	Broken Units per Whole Unit	Fair Market Value/Standard Price	Stock Item	Edit	Delete
1% MILK, 8 OZ CARTON	Local	Carton	each	8.0000 ounce	8.000000 ounce	1	\$0.28	1% MILK, 8 OZ CARTON		
1% MILK, GALLON	Local	gallon	quart	1.0000 quart		4	\$4.15	1% MILK, GALLON		
ALMONDS, SLICED, NATURAL			bag	1.0000 pound			\$12.08	ALMONDS, SLICED, NATURAL		

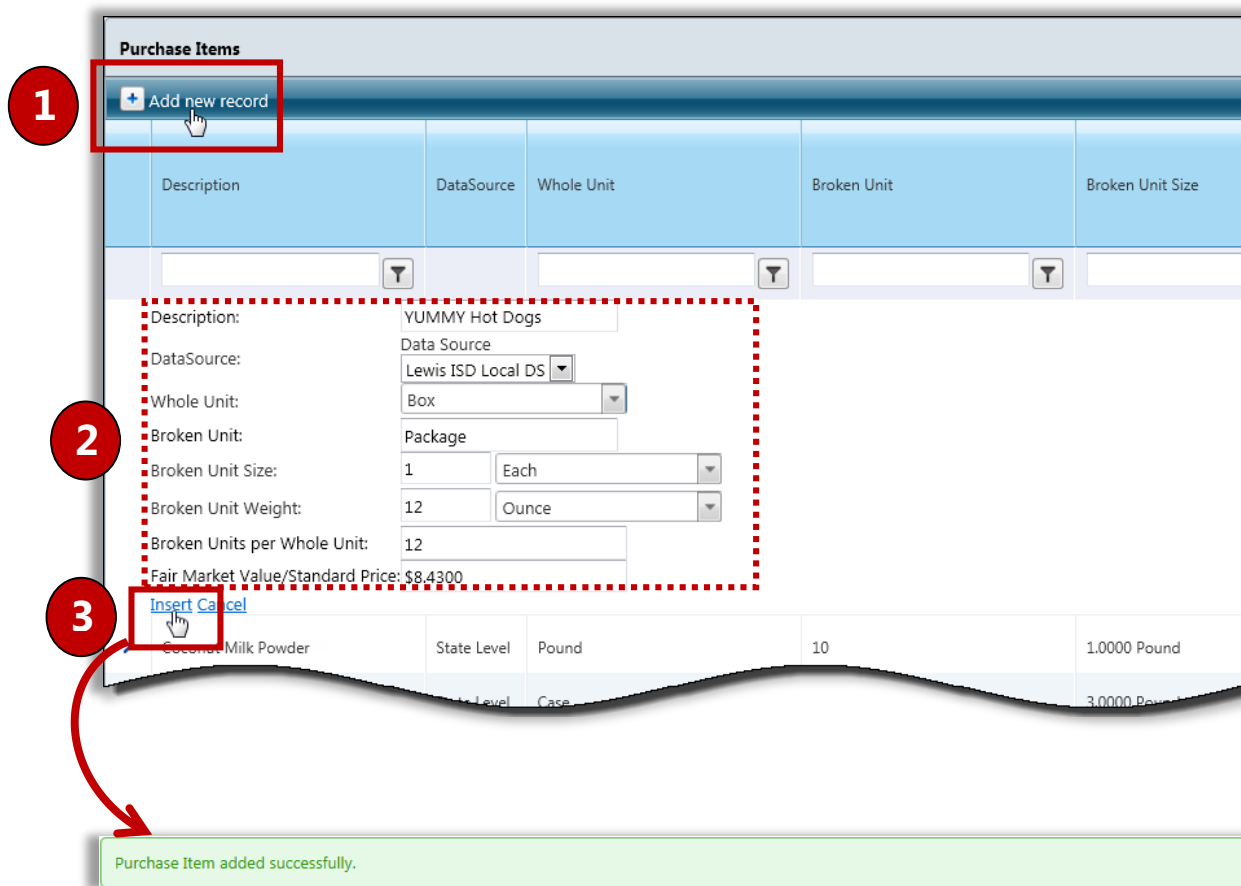
Header Name	Data Type	Description
Description	View only	<i>Sortable</i> ; ingredient short description
Data Source	View only	Data location (database) of purchase item
Whole Unit	View only	Description of a purchasable unit sold as “one”
Broken Unit	View only	Description of the individual units that make up a whole unit
Broken Unit Size	View only	Quantity of an individual unit
Broken Unit Weight	View only	Weight of an individual unit
Broken Units per Whole Unit	View only	Total number of individual units that make up a whole unit
Fair Market Value/Standard Price	View only	Price of one whole unit of the purchase item that an interested buyer would be willing to pay
Stock Item	Clickable link	Click to either link the purchase item to a stock item in inventory or to change the linked stock item.
Edit	Clickable icon ()	Click to change the purchase item details. Note: Icon is available only for <i>local</i> items.
Delete	Clickable link ()	Click to remove the purchase item listing. Note: Icon is available only for <i>local</i> items.

Adding a New Purchase Item

Purchase Items are added manually in installations that do not use the PrimeroEdge **[Inventory]** module.

To add a new Purchase Item:

1. Click .
2. Enter Purchase Item details.
3. Click the [Insert](#) link.



The screenshot shows the 'Purchase Items' form in a web application. The form has a header bar with a blue background and a white button labeled '+ Add new record' with a plus icon. Below the header is a table with columns: Description, DataSource, Whole Unit, Broken Unit, and Broken Unit Size. The table has a filter icon in each column header. Below the table is a form area with a red dashed border. The form contains the following fields: Description (text input), DataSource (dropdown menu), Whole Unit (dropdown menu), Broken Unit (text input), Broken Unit Size (text input), Broken Unit Weight (text input), Broken Unit Weight (dropdown menu), Broken Units per Whole Unit (text input), and Fair Market Value/Standard Price (text input). The 'Insert' link is highlighted with a red box and a red arrow pointing to it. A red circle with the number '1' is next to the '+ Add new record' button. A red circle with the number '2' is next to the form area. A red circle with the number '3' is next to the 'Insert' link. A red arrow points from the 'Insert' link to a green box at the bottom of the page that says 'Purchase Item added successfully.'

Purchase Items

+ Add new record

Description	DataSource	Whole Unit	Broken Unit	Broken Unit Size

Description: YUMMY Hot Dogs

DataSource: Lewis ISD Local DS

Whole Unit: Box

Broken Unit: Package

Broken Unit Size: 1 Each

Broken Unit Weight: 12 Ounce

Broken Units per Whole Unit: 12

Fair Market Value/Standard Price: \$8.4300

[Insert](#) [Cancel](#)

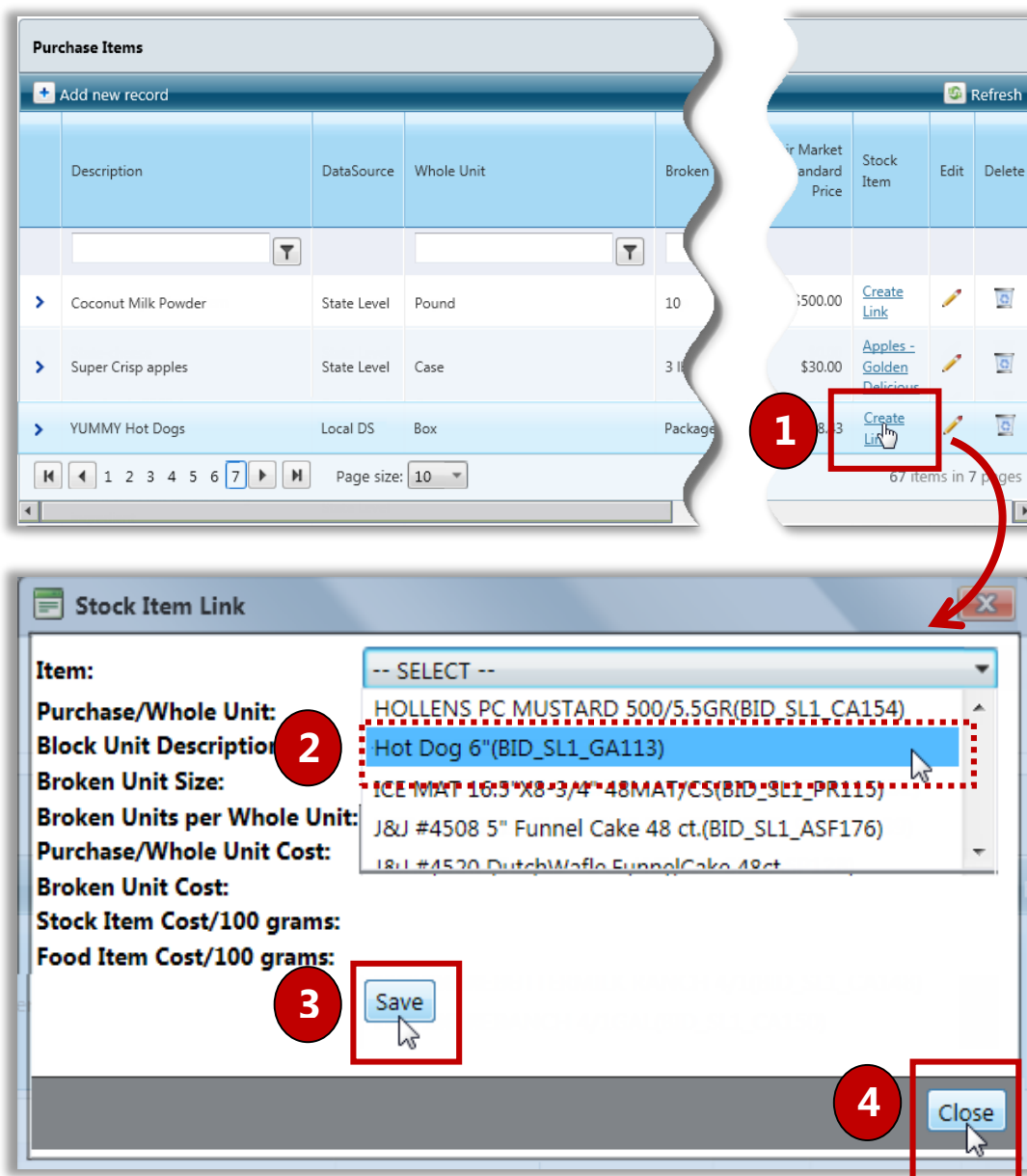
Purchase Item added successfully.

Creating a Link to a Stock Item

If your district uses the PrimeroEdge **[Inventory]** module, you will link a Purchase Item to an Inventory stock item. The linked stock item name then appears in the **Stock Item** column.

To create a Purchase Item link:


1. Click the [Create Link](#) link in the **Purchase Items** listing.
2. Select the stock item.
3. Click [Save](#).
4. Click [Close](#).

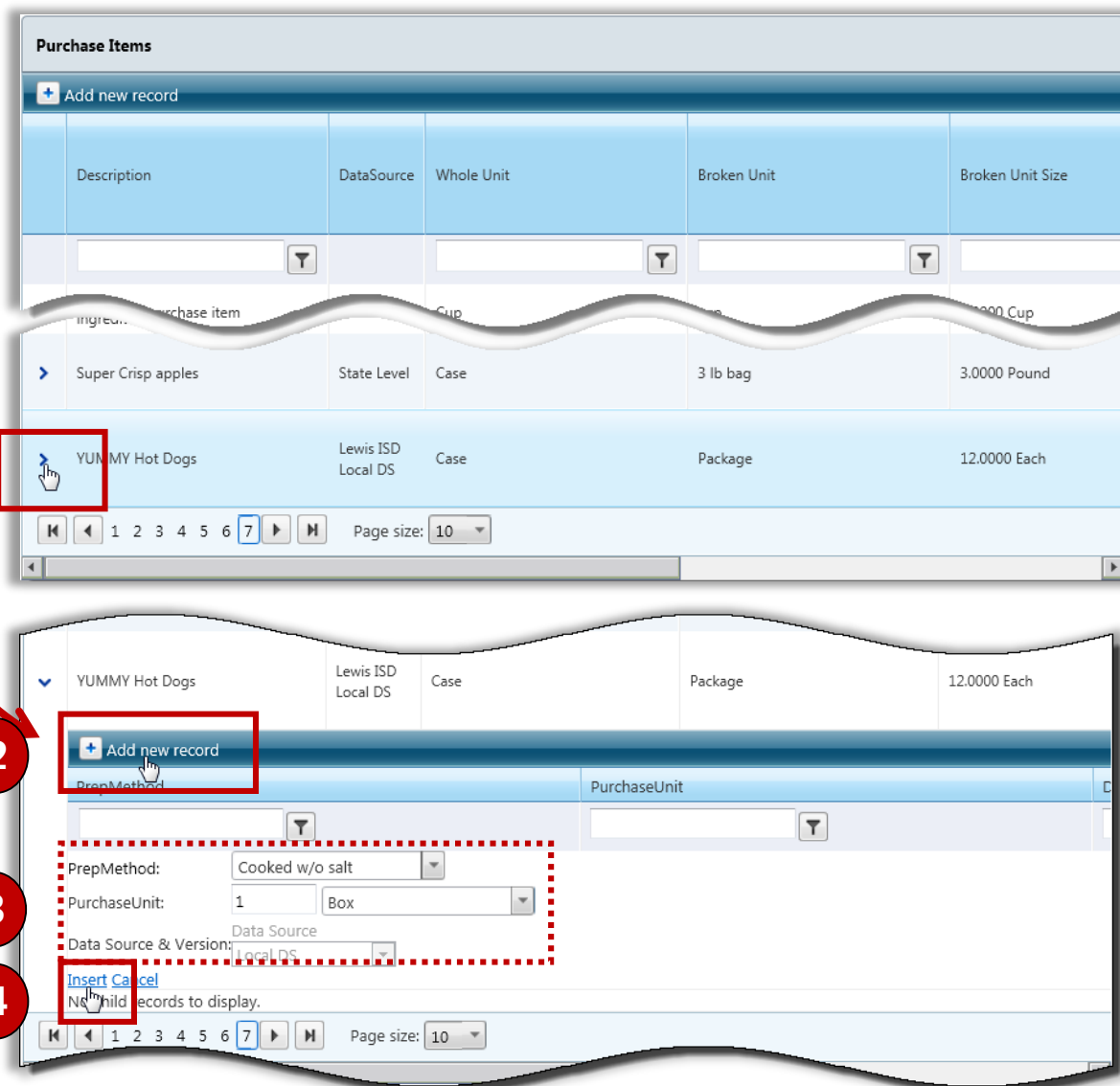


Adding an Ingredient Form to a Purchase Item

The same ingredient may be purchased in different forms (preparation methods). Multiple Ingredient forms can be included in a Purchase Item record.

To add an Ingredient form to a Purchase Item:

1. Expand a purchase item listing.
2. Click .
3. Select form details.
4. Click the [Insert](#) link.



The screenshot illustrates the process of adding a new ingredient form to a purchase item in the PrimoEdge system. It is divided into two parts: the main 'Purchase Items' list and a detailed view of a selected item.

Top Screenshot (Purchase Items List):


- 1:** A red circle with the number '1' points to the expand icon (a right-pointing arrow) next to the 'YUMMY Hot Dogs' row in the table.
- Table Headers:** Description, DataSource, Whole Unit, Broken Unit, Broken Unit Size.
- Table Rows:**
 - Ingredient: Super Crisp apples, DataSource: State Level, Whole Unit: Case, Broken Unit: 3 lb bag, Broken Unit Size: 3.0000 Pound.
 - Ingredient: YUMMY Hot Dogs, DataSource: Lewis ISD Local DS, Whole Unit: Case, Broken Unit: Package, Broken Unit Size: 12.0000 Each.
- Footer:** Navigation buttons (back, first, previous, next, last), page number 7, and page size 10.

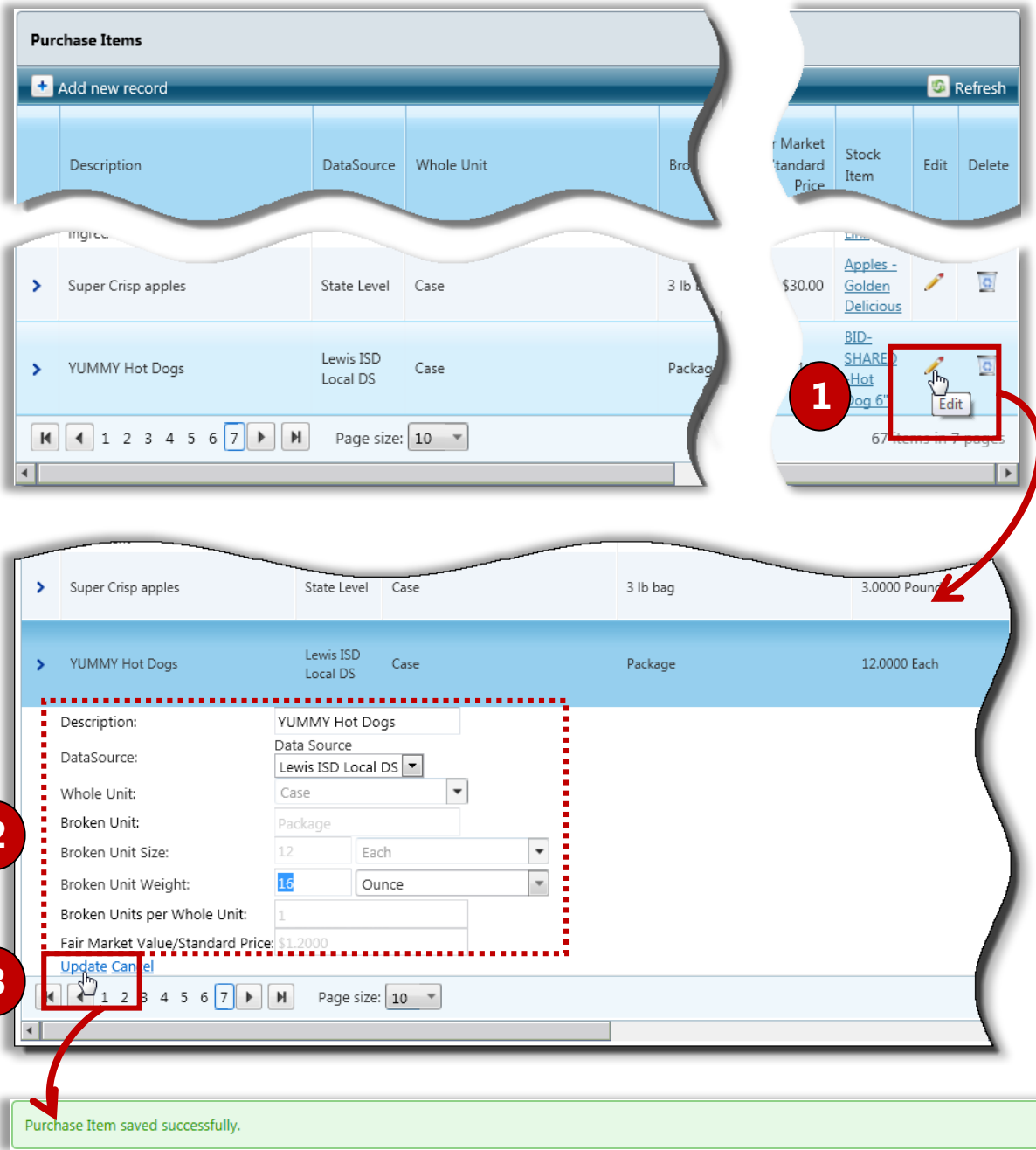
Bottom Screenshot (Detailed View of YUMMY Hot Dogs):

- 2:** A red circle with the number '2' points to the 'Add new record' button (a blue button with a plus icon) at the top of the form.
- 3:** A red circle with the number '3' points to the 'PrepMethod' dropdown menu, which is currently set to 'Cooked w/o salt'.
- 4:** A red circle with the number '4' points to the 'Insert' link at the bottom of the form.
- Form Fields:**
 - PurchaseUnit:** A dropdown menu currently set to 'Box'.
 - Data Source & Version:** A dropdown menu currently set to 'Local DS'.
- Footer:** Navigation buttons, page number 7, and page size 10.

Updating Purchase Item Details

To update Purchase Item details:

1. Click **Edit** () in a Purchase Item listing.
2. Change Purchase Item details, as needed.
3. Click the **Update** link.


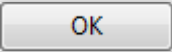


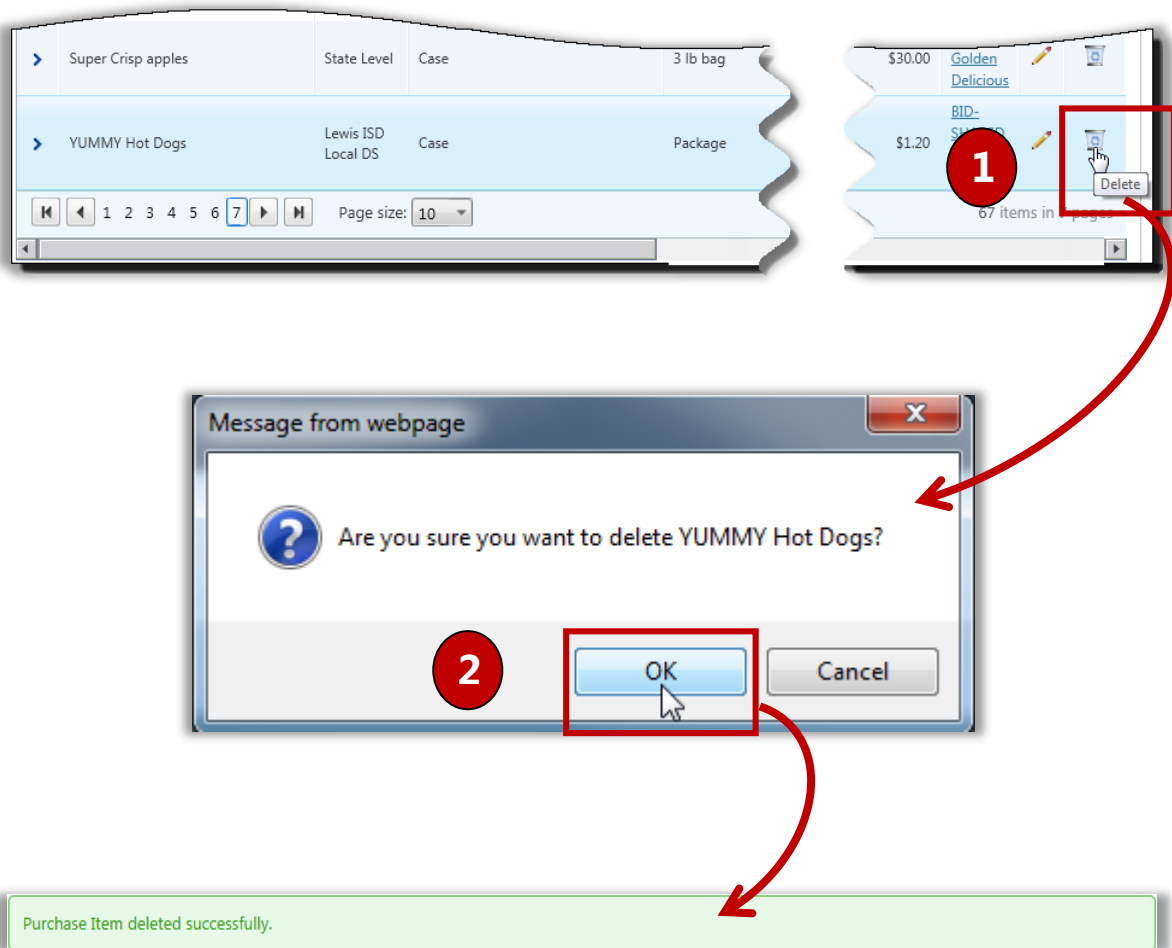
The screenshot illustrates the process of updating a purchase item in the PrimoEdge system. It is divided into three main sections:

- Top Left:** A table titled "Purchase Items" with columns: Description, DataSource, Whole Unit, and Broken Unit. It lists "Super Crisp apples" and "YUMMY Hot Dogs".
- Top Right:** A detailed view of the "YUMMY Hot Dogs" item, showing its market price (\$30.00), stock item name, and action buttons: Edit (pencil icon) and Delete (trash icon). A red circle with the number "1" highlights the Edit button.
- Bottom:** The "Edit Purchase Item" form for "YUMMY Hot Dogs". It contains fields for Description, DataSource (Lewis ISD Local DS), Whole Unit (Case), Broken Unit (Package), Broken Unit Size (12), Broken Unit Weight (16 Ounce), and Broken Units per Whole Unit (1). A red circle with the number "2" highlights the form fields. At the bottom of the form, there are "Update" and "Cancel" links. A red circle with the number "3" highlights the "Update" link. A red arrow points from the "Update" link to a green success message at the bottom: "Purchase Item saved successfully."

Deleting a Purchase Item

To delete a Purchase Item

1. Click **Delete** () in a Purchase Item listing.
2. Click  in the confirmation message.



◀ *End of Section* ▶

3


Menus

In this chapter you will learn:

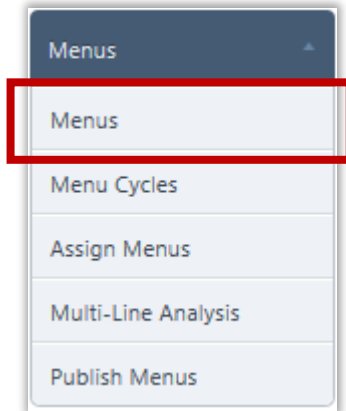
- ✓ Add a Menu.
- ✓ Add or remove Menu Items on a Menu.
- ✓ Change Menu information and details.
- ✓ View Menu nutrients and nutrition facts.
- ✓ Create a Menu Cycle.
- ✓ Change Menus in a Menu Cycle.
- ✓ Change Menu Cycle information and details.
- ✓ Assign a Menu or a Menu Cycle to a calendar date or range of dates.
- ✓ Change or remove Menus or Menu Cycles assigned to a calendar date or date range.

Menus at a Glance

Menu Function	Description
Menus	Create and change menus and menu contents.
Menu Cycles	Create and maintain a set of menus selected for a specified number of days and weeks (cycle).
Assign Menus	Assign and change menus assigned to a calendar date or range of dates for selected schools.
Multi-Line Analysis	Analyze Menu Lines in Menu Cycles to determine if required Nutrient and Food Component values have been met.
Publish Menus	Publish menus to the ParentOnline web site for review by ParentOnline patrons.

 **Note:** Menus and functions to which you have access are those that are appropriate for your role within PrimeroEdge. When you access the **Menus** menu, you may see a subset of the functions listed above.

Menus



Menus allows you to create menus and menu templates with one or more menu items. Nutrients and nutrition facts can be displayed for a menu.

Menu selections can be updated as needed by choosing different menu item categories, analysis method and USDA groups.

Menu particulars

- Menus can be made inactive (discontinued).
- Menus can include Menu Items with inactive ingredients.
- Inactive Menu Items cannot be added to a Menu.
- An inactive Menu can be copied; copy is active by default.
- To include inactive Menus in search results, the **Include Discontinued Menu** option must be selected.



Menu Page

 A screenshot of the 'Menus' page in a web application. The page has a dark blue header with the title 'Menus'. Below the header, there is a section for filters with four dropdown menus: 'Data Source' (set to '-- ALL --'), 'Meal Pattern' (set to '-- ALL --'), 'Meal Type' (set to '-- ALL --'), and 'Site Group' (set to '-- ALL --'). Below these are 'Tags' and 'Name' input fields. A checkbox labeled 'Include Discontinued Menus' is unchecked. There are 'Apply' and 'Reset' buttons. Below the filters is a 'Menu List' table. The table has columns: Name, Site Group, Meal Type, Meal Pattern, Data Source, On Calendar, and a 'Discontinue' button. The table contains several rows of menu items, including 'Bagel Bar Brkfst', 'Bagel Bkfst', 'Bar-B-Que Lunch', 'Chicken Cluckers', 'Green...', and 'Hot Brkfst'. At the bottom of the page, there is a pagination bar with 'Page size: 10' and '15 items in 2 pages'.

By default on the **Menus** page:

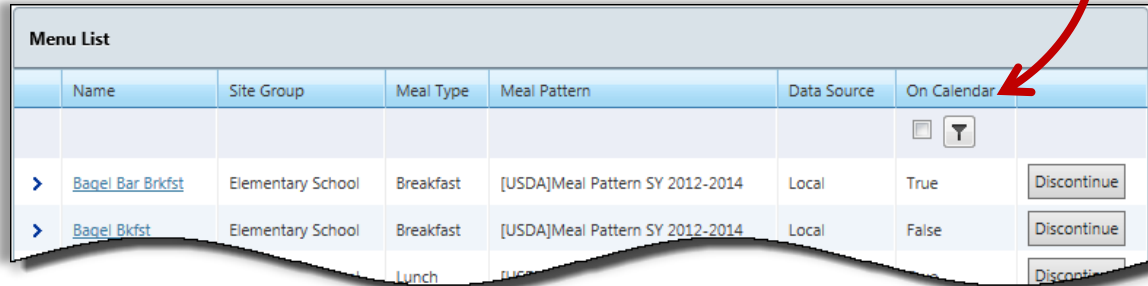
- **Data Source**, **Meal Pattern**, **Meal Type**, and **Site Group** are set to “ALL”.
- **Tags** and **Name** are blank.
- **Include Discontinued Menus** option is cleared.


Page Functions

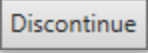
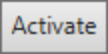
Button/Link	Description
	Click to display all recipe records in the Recipe List that match the set search conditions.
	Click to return all search criteria fields to the default settings.

Menu List Listings

Click to display only those menus that appear on a menu calendar (True)



Menu List						
	Name	Site Group	Meal Type	Meal Pattern	Data Source	On Calendar
						<input type="checkbox"/> 
>	Bagel Bar Brkfst	Elementary School	Breakfast	[USDA]Meal Pattern SY 2012-2014	Local	True
>	Bagel Bkfst	Elementary School	Breakfast	[USDA]Meal Pattern SY 2012-2014	Local	False
			Lunch			

Header Name	Data Type	Description
Name	View only	Menu name
Site Group	View only	<i>Sortable</i> ; Site Group to which the menu is assigned
Meal Type	View only	<i>Sortable</i> ; Meal Type on which the menu is based
Meal Pattern	View only	<i>Sortable</i> ; Meal Pattern on which the menu is based
Data Source	View only	<i>Sortable</i> ; Collection of which the Menu in a member
On Calendar	View only	<i>Sortable</i> ; Indicates if Menu appears on a menu calendar
(Active/ Inactive)	Clickable button	Click  to make menu inactive.
		Click  to make menu active.

Searching for a Menu

Six separate search conditions can be used to narrow your search for a Menu or group of menus. By default, active Menus are listed. To include discontinued (inactive) Menus, select the **Include Discontinued Menus** option.

To search for a Menu

1. Select or enter one or more search conditions.
2. Click **Apply**.

The screenshot shows the 'Menus' search interface. The top section contains search filters: Data Source (dropdown), Meal Pattern (dropdown), Meal Type (dropdown), Site Group (dropdown), Tags (dropdown), and Name (text input). A red dashed box labeled '1' highlights these filters. Below the filters is a checkbox for 'Include Discontinued Menus' and buttons for 'Apply' and 'Reset'. A red box labeled '2' highlights the 'Apply' button. A red arrow points from the 'Apply' button to the 'Menu List' table below.

Menu List

	Name	Site Group	Meal Type	Meal Pattern	Data Source	On Calendar	Status	
>	Adult Ed Monday Lunch	High School	Breakfast	[USDA]Meal Pattern SY 2012-2014	Local	False	Active	Discontinue
>	High School Monday Lunch	High School	Breakfast	[USDA] Traditional Meal Pattern	Local	True	Active	Discontinue
>	Special Needs Monday Lunch	High School	Breakfast	[USDA]Meal Pattern SY 2012-2014	Local	True	Active	Discontinue
>	Tech Center Monday Lunch	High School	Breakfast	[USDA]Meal Pattern SY 2012-2014	Local	False	Active	Discontinue

Adding a Menu

To add a new Menu

1. Click the [Add a new Menu](#) link.
2. Enter and select menu details; when a menu template is not used, select Serving Groups with Projected Meal Counts and Menu Item Categories with number of Choices specified.
3. Click .

The screenshot shows the 'Menus' form in a web application. The form is divided into two main sections. The top section contains the 'Add a new Menu' link, which is highlighted with a red box and a red circle labeled '1'. Below this link are several dropdown menus: 'Data Source' (set to 'Local'), 'Meal Pattern' (set to '[USDA]Meal Pattern SY 2'), 'Meal Type' (set to 'Lunch'), and 'Site Group' (set to 'Elementary School'). The bottom section contains various input fields and checkboxes. A red circle labeled '2' points to the 'Menu Description' field, which contains the text 'Spaghetti Lunch'. Other fields include 'Menu Short Description' (also 'Spaghetti Lunch'), 'Nutrition Analysis Method' (set to 'Weighted Analysis'), 'Projected Servings Count as a Percentage' (checkbox), 'Menu Item Categories' (set to 'Entrees,Fruits,Milk'), and 'Serving Groups' (set to 'K-5'). A red circle labeled '3' points to the 'Save' button in the top right corner of the form.

Editing a Menu

Completed Menus are assigned to dates on a Menu Calendar. Menus assigned to past dates cannot be changed. Therefore, if you choose to edit a Menu that is assigned to past dates and also to future dates, a copy of the Menu is made as part of the editing process and you will choose the future dates to which the copied Menu is to be applied.

Before editing a Menu, you can display a list of all dates to which the Menu has been or is currently assigned.

To display a list of Menu Calendar assignments for a Menu

- Display a menu and click the [Show Calendar](#) link.

Menu Info

[Add a new Menu](#)

⚠ This menu has been assigned to current/past dates on the menu calendar and hence cannot be modified. Please click Edit to view the options of editing this menu on select dates.

Menu Fiesta Lunch

[Show Calendar](#) Edit Copy Save

Data Source: [Dropdown] Meal Pattern: [USDA]Meal Pattern SY 2 Meal Type: [Lunch] Site Group: [Elementary School]

Menu Calendar

Production Status	Serving Date	Day	Site Group	Menu Line
Plan Incomplete	9/17/2013	Tuesday	Elementary School	Regular
Plan Incomplete	9/12/2013	Thursday	Elementary School	Regular
Plan Incomplete	8/2/2013	Friday	Elementary School	Regular
Plan Incomplete	5/8/2013	Wednesday	Elementary School	Regular
Plan Incomplete	5/2/2013	Thursday	Elementary School	Regular
Record Complete	4/30/2013	Tuesday	Elementary School	Regular

If today is July 22, 2013 (7/22/2013), you see that three of the six listed dates are in the future, i.e., can be changed. The three menus listed for April and May could not be modified.

To edit a Menu with Menu Calendar assignments

1. Display a Menu and click **Edit**.
2. Select the dates to modify on the Menu Calendar.
3. Click **Copy**.
4. Make changes to the Menu and click **Save**.

Menu Info

Add New Menu

⚠ This menu has been assigned to current/past dates on the menu calendar and hence cannot be modified. Please click Edit to view the options of editing this menu on select dates.

Menu Fiesta Lunch

Calendar Edit Copy Save

Copy Menu/Menu Template

☐ All future calendar assignments ☒ Show Calendar

Menu Calendar (Only dates on which modifications are allowed are displayed)

<input type="checkbox"/>	Production Status	Serving Date	Site Group	Menu Line
<input checked="" type="checkbox"/>	Plan Incomplete	9/9/2013	Elementary School	Regular
<input type="checkbox"/>	Plan Incomplete	8/28/2013	Elementary School	Regular
<input type="checkbox"/>	Plan Incomplete	8/2/2013	Elementary School	Regular

Name for the copy: Fiesta Lunch II

Short Name for the copy: Fiesta Lunch II

Changes are applied only to 9/17/2013, 9/12/2013

Menu Info

Add New Menu

Menu Copy of Fiesta Lunch

Show Calendar Copy Save

Meal Pattern: Lunch Meal Type: Lunch Site Group: Elementary School

Category: 30 - Fruit, Choose: 2

Applesauce, mixed berry, 72/4 oz cup; as purchased	1 Fruit	300 75% 4 Ounce	
Snacks, banana chips	1/2 Fruit	50 13% 3 Ounce	
Strawberries, raw	1 Fruit	50 13% 1 CN-CUP, halves	

Changes are applied only to 9/17/2013, 9/12/2013

Menu saved successfully.

Adding a Menu Item to a Menu

To add a Menu Item

1. Click the [Add Menu Items](#) link on the Menu Info page.
2. Select one or more menu items.
3. Click [Add](#).

Step 1: Click the [Add Menu Items](#) link on the Menu Info page.

Step 2: Select one or more menu items.


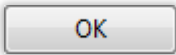
Step 3: Click [Add](#).

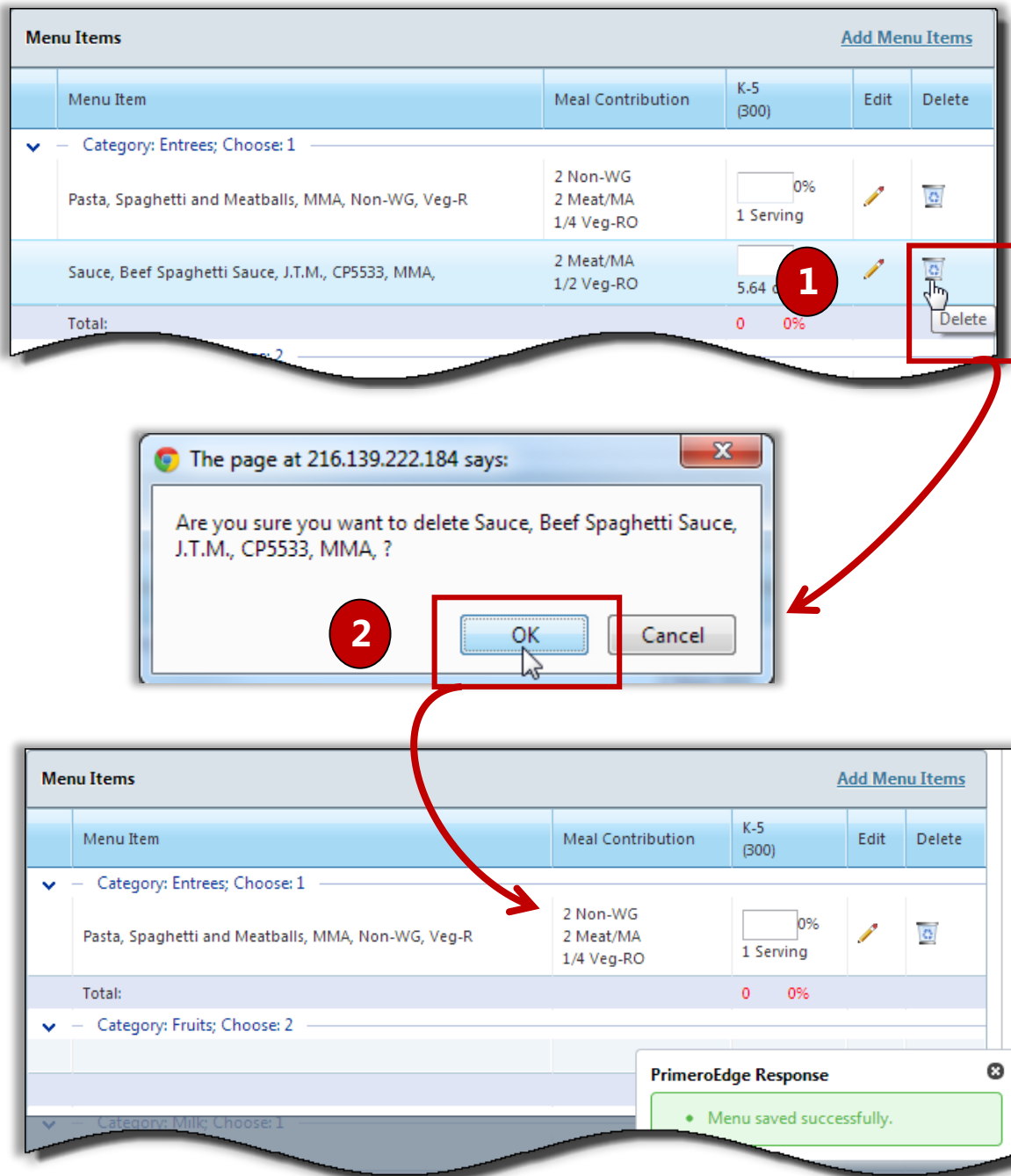
The diagram illustrates the process across three screenshots:

- Top Screenshot (Menu Info page):** Shows the 'Menu Items' table with columns: Menu Item, Meal Contribution, K-5 (300), Edit, and Delete. The 'Add Menu Items' link is highlighted with a red box and a red circle labeled '1'.
- Middle Screenshot (PrimeroEdge - Add Menu Item to Menu dialog):** Shows a table of menu items with columns: Category, Menu Item (Recipe Code), Serving Size, Meal Contribution, Allergens, and Source. Two items are selected with checkboxes, indicated by a red dashed box and a red circle labeled '2'. The 'Add' button is highlighted with a red box and a red circle labeled '3'.
- Bottom Screenshot (Menu Items table):** Shows the 'Menu Items' table with columns: Menu Item, Meal Contribution, K-5 (300), Edit, and Delete. The 'Add Menu Items' link is highlighted with a red box and a red circle labeled '3'.

Deleting a Menu Item from a Menu

To delete a Menu Item

1. Click **Delete** () in the menu item listing on the Menu Info page.
2. Click  in the confirmation message.



Menu Items [Add Menu Items](#)

Menu Item	Meal Contribution	K-5 (300)	Edit	Delete
Category: Entrees; Choose: 1				
Pasta, Spaghetti and Meatballs, MMA, Non-WG, Veg-R	2 Non-WG 2 Meat/MA 1/4 Veg-RO	0% 1 Serving		
Sauce, Beef Spaghetti Sauce, J.T.M., CP5533, MMA,	2 Meat/MA 1/2 Veg-RO	5.64		
Total:		0 0%		

The page at 216.139.222.184 says:

Are you sure you want to delete Sauce, Beef Spaghetti Sauce, J.T.M., CP5533, MMA, ?

2

Menu Items [Add Menu Items](#)



Menu Item	Meal Contribution	K-5 (300)	Edit	Delete
Category: Entrees; Choose: 1				
Pasta, Spaghetti and Meatballs, MMA, Non-WG, Veg-R	2 Non-WG 2 Meat/MA 1/4 Veg-RO	0% 1 Serving		
Total:		0 0%		
Category: Fruits; Choose: 2				
Category: Milk; Choose: 1				

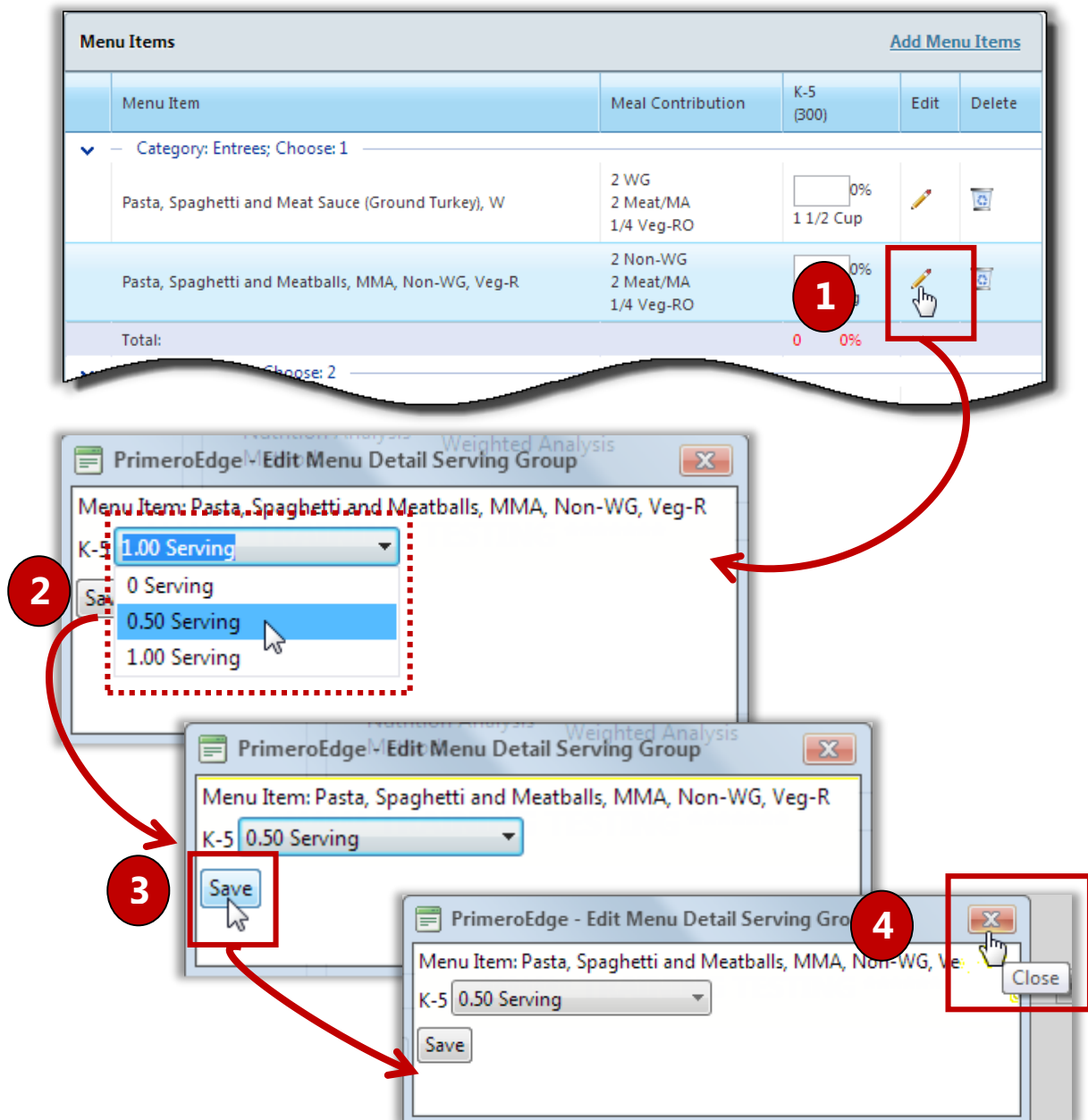
PrimeroEdge Response

- Menu saved successfully.

Changing Menu Item Serving Size

To update Menu Item details

1. Click **Edit** () in a menu item listing on the Menu Info page.
2. Select a new serving size.
3. Click **Save** .
4. Click **Close** ().



Changing Serving Groups for a Menu

Serving groups can be added or removed from a menu as well as the projected meal counts can be updated for each group when needed.

To update menu Serving Groups

1. Display a menu and click the **Serving Groups** button.
2. Select a new serving group to include and enter a projected meal count, or clear a group selection, or enter new projected meal counts for an existing serving group.
3. Click **Save**.

Menu: Spaghetti Lunch

Meal Pattern: [USDA]Meal Pattern SY 2 Meal Type: Lunch Site Group: Elementary

Menu Description: Spaghetti Lunch

Status: ☒ Is Active

Menu Short Description: Spaghetti Lunch

Nutrition Analysis Method: Weighted Analysis

Projected Servings Count as a Percentage: ☐

Menu Item Categories: Entrees, Fruits, Milk

Menu Costing: ☐ Add Standard Menu ☐ Generate Report

Tags: Enter the name of the tag or select from the list

Serving Groups

Include	Serving Group	Projected Meal Count
<input checked="" type="checkbox"/>	K-5	300
<input type="checkbox"/>	K-8	
<input checked="" type="checkbox"/>	6-8	750
<input type="checkbox"/>	9-12	
<input type="checkbox"/>	Adult	
<input type="checkbox"/>	A la Carte	

Menu Items

Menu Item: Category: Entrees; Choose: 1

Changing Menu Item Category Assignments for a Menu

Menu Item Categories can be added or removed from a menu; choice counts can be updated for each category when needed.

To update menu Serving Groups

1. Display a menu and click the **Menu Item Categories** button.
2. Select a new category to include and enter the number of items the patron can choose from the category, or clear a category selection, or enter new choice counts for an existing category, when necessary.
3. Click **Save**.

Menu Spaghetti Lunch

Meal Pattern: [USDA]Meal Pattern SY 2 | Meal Type: Lunch | Site Group: Elementary

Menu Description: Spaghetti Lunch

Status: ☒ Is Active

Menu Short Description: Spaghetti Lunch

Nutrition Analysis Method: Weighted Analysis

Projected Servings Count as a Percentage: ☐

Menu Item Categories: Desserts,Entrees,Fruits,Milk

Serving Groups: K-5

Include	Category	Choose
<input type="checkbox"/>	Condiments	
<input checked="" type="checkbox"/>	Desserts	1 x
<input checked="" type="checkbox"/>	Entrees	1
<input checked="" type="checkbox"/>	Fruits	2
<input type="checkbox"/>	Grains	
<input checked="" type="checkbox"/>	Milk	1
<input type="checkbox"/>	Vegetables	

Menu Items

Menu Item:
 - Category: Entrees; Choose: 1

Save

Generating a Menu Costing Report

The Menu Costing Report provides the cost of the materials to produce Menu Items on a Menu.

To generate a Menu Costing Report

1. Display a menu on the *Menu Info* page.
2. Click **Generate Report** to the right of the **Menu Costing** label.

The screenshot shows the 'Menu Info' page for a menu titled 'Tiger Trail Study Trip Oct 23 and 24 PBJ'. The page includes a warning message at the top: 'This menu has been assigned to current/past dates on the menu calendar and hence cannot be modified. Please click Edit to view the options of editing this menu on select dates.' Below the warning, there are several fields for menu configuration: Data Source (Local), Meal Pattern ([USDA]Meal Pattern SY 2), Meal Type (Lunch), and Site Group (PK ECC). The Menu Description is 'Study Trip - PB&J'. The Status is 'Is Active'. The Menu Short Description is 'Study Trip - PB & J'. The Nutrition Analysis Method is 'Weighted Analysis'. The Serving Groups are 'PK, Adult'. The Menu Item Categories are 'Fruit, Grains, Meat/Meat Alternatives, Milk'. At the bottom, there is a 'Menu Costing' section with a 'Generate Report' button highlighted by a red box and a red circle with the number 2. A red circle with the number 1 is also present at the top of the page.

http://freeandreduced.springbranchisd.com/Primero/reportviewer.aspx - Internet Explorer

Generated on: 11/15/2013 12:28:18 PM

Study Trip PBJ

[USDA]Meal Pattern SY 2012-2014--PK ECC

Meal Type: Lunch

Total Meals: 200

Recipe Code	Description	Serving Size	Planned Qty	Unit Cost	Total Cost
Fruit					
LR-1378	Apples, All Varieties 2013	1 ea.	200	0.2210	44.20
Food Cost / Meal:				0.22	
Meat/Meat Alternatives					
LR14225	Peanut Butter & Jelly Sandwich 2013	1 ea.	200	0.3724	74.48
Food Cost / Meal:				0.37	
Milk					
LR-1367	Milk, 1% White, Paper 2013	1 ea.	10	0.2690	2.69
LR-1370	Milk, Nonfat, White Paper 2013	1 ea.	10	0.2690	2.69
LR-1365	Milk, Nonfat, Chocolate Paper 2013	1 ea.	160	0.2710	43.36
LR-1372	Milk, Whole, CC	1 ea.	20	0.2720	5.44
Food Cost / Meal:				0.27	
Other/Condiment					
LR-1290	Condiment, Ranch Dressing, PC	1 ea.	200	0.0478	9.55
Food Cost / Meal:				0.05	
Vegetables					
LR-1188	Baby Carrot Snack Pack 2013	3 oz.	10	0.1600	1.60
LR-1032	Sliced Cucumbers 2013	1/4 c.	5	0.0481	0.24
LR-1032	Sliced Cucumbers 2013	1/2 c.	5	0.0963	0.48
Food Cost / Meal:				0.01	
Grand Totals:				0.92	184.73


Page: 1 of 1

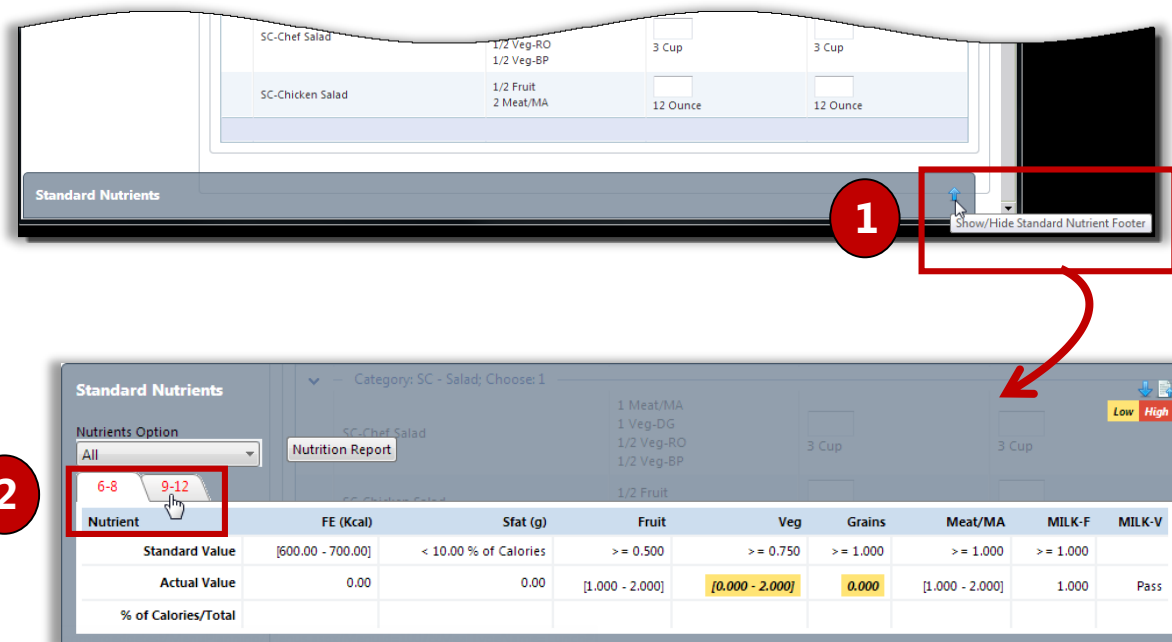
Viewing Menu Nutrients and Food Components

Each menu display includes a Standard Nutrients footer. This footer provides one tab of nutrition information for each serving group.

- Nutrient values that fall *below* the requirements for a food component are highlighted in **yellow**.
- Nutrient values that fall *above* the maximum nutritional requirements are highlighted in **red**.
- **Fail** message in the **Milk-V** column indicates that the requirement for providing at least two choices (a “variety” of milks) in a meal service has not been met.

To view Standard Nutrients for a Serving Group


1. Display a menu and click **Show/Hide Standard Nutrients Footer** ().
2. Click a tab to view nutrients for a different serving group.

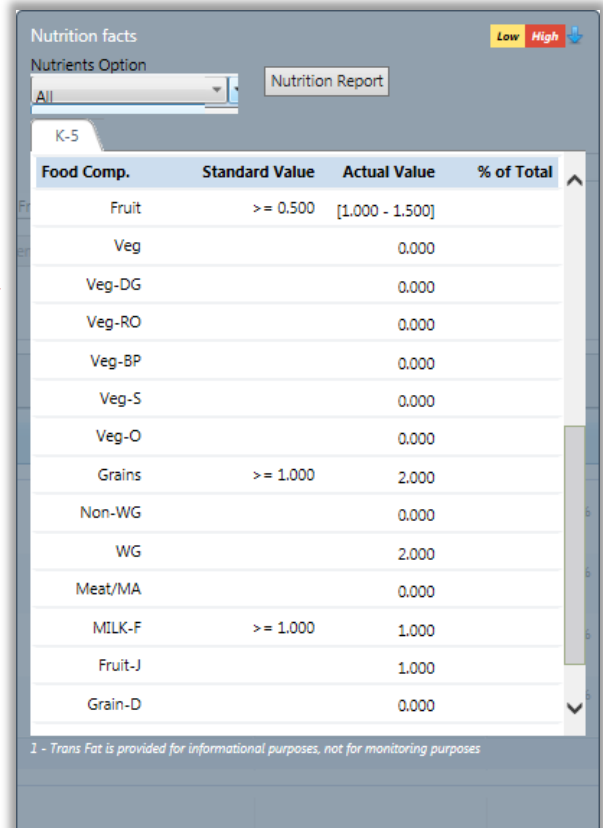
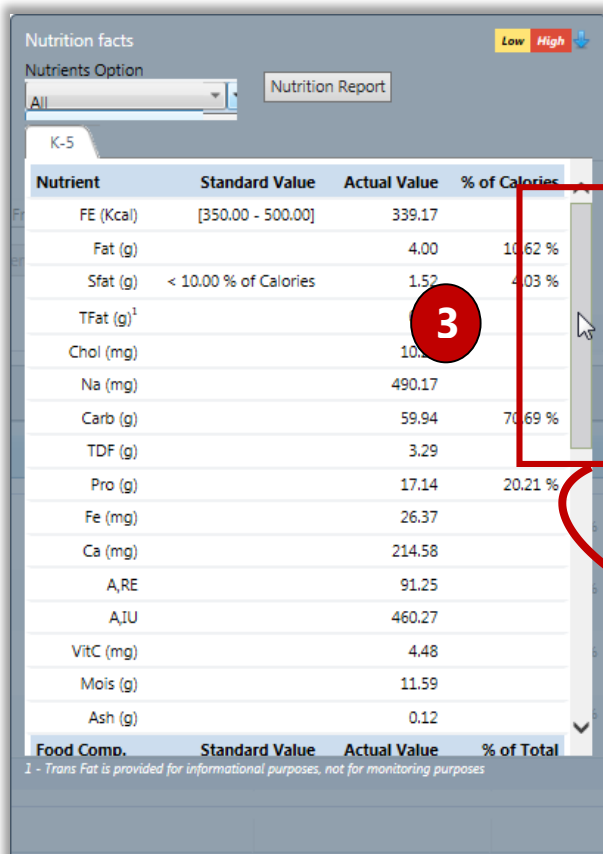
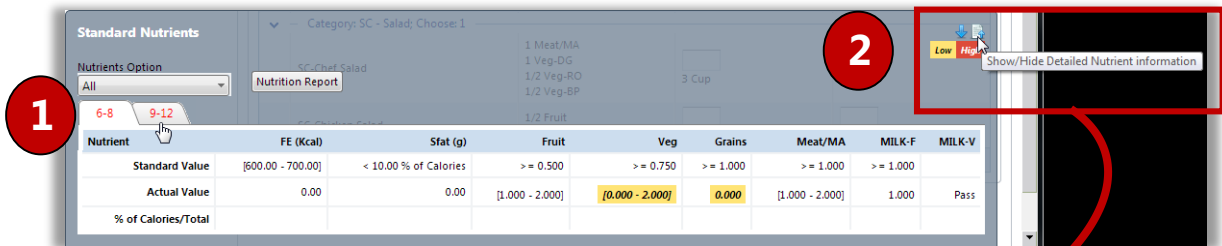


The image shows two screenshots illustrating how to view standard nutrients. The top screenshot shows a menu display with a 'Standard Nutrients' footer. A red box labeled '1' highlights the 'Show/Hide Standard Nutrient Footer' button, which has an up arrow icon. The bottom screenshot shows the 'Standard Nutrients' report table. A red box labeled '2' highlights the 'Nutrients Option' dropdown menu, which is set to 'All'. The table displays various nutrient values for a selected item (SC - Salad).

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Veg	Grains	Meat/MA	MILK-F	MILK-V
Standard Value	[600.00 - 700.00]	< 10.00 % of Calories	> = 0.500	> = 0.750	> = 1.000	> = 1.000	> = 1.000	
Actual Value	0.00	0.00	[1.000 - 2.000]	[0.000 - 2.000]	0.000	[1.000 - 2.000]	1.000	Pass
% of Calories/Total								

To view Standard Nutrients details for a Serving Group

1. Display a menu and click a tab to view nutrients for a serving group.
2. Click **Show/Hide Detailed Nutrient Information** ().
3. Scroll to view Food Component details.



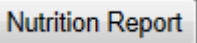
Generating the Menu Nutrient Analysis Report

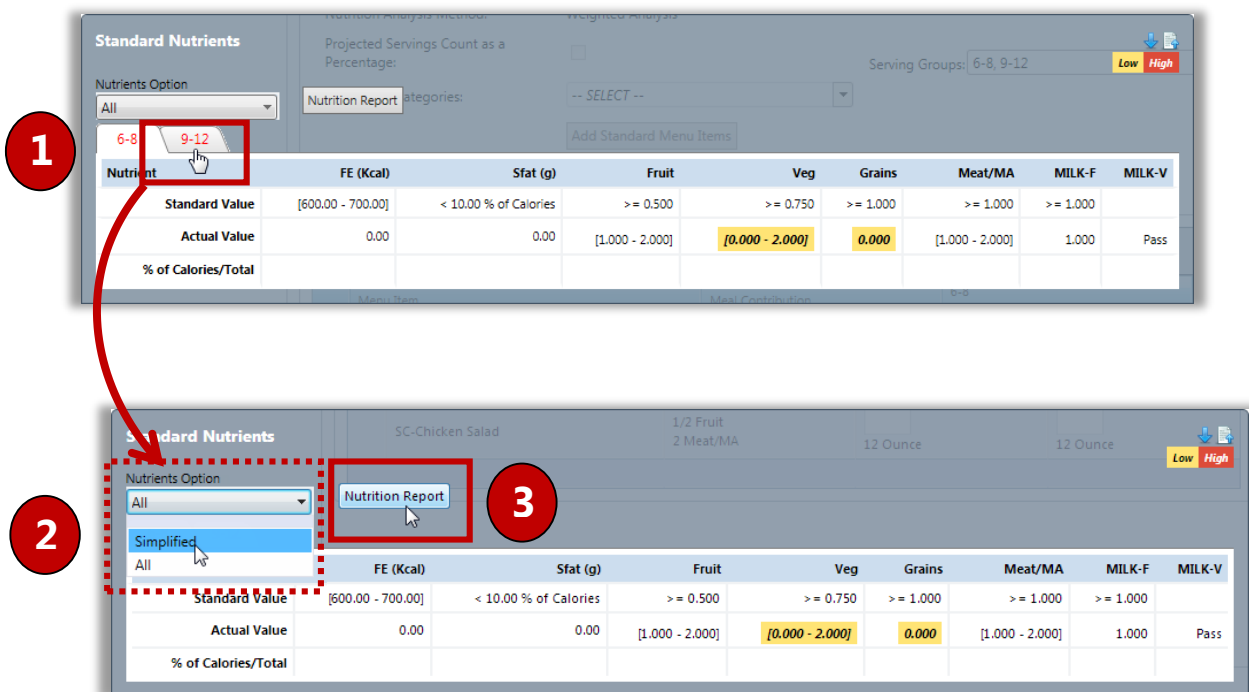
The Menu Nutrient Analysis Report displays either detailed nutrition information for all nutrients or “simplified” information that includes:

- Calories
- Saturated Fat
- Calcium

The default selection is “All” which is set through the [Default Nutrients Option](#) system setting.

To view Standard Nutrients details for a Serving Group

1. Display the Standard Nutrients footer for a menu and select a serving group.
2. Select a Nutrient Option.
3. Click .



Standard Nutrients

Nutrients Option: All

Projected Servings Count as a Percentage: ☐ Nutrition Report categories: -- SELECT --

Serving Groups: 6-8, 9-12

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Veg	Grains	Meat/MA	MILK-F	MILK-V
Standard Value	[600.00 - 700.00]	< 10.00 % of Calories	>= 0.500	>= 0.750	>= 1.000	>= 1.000	>= 1.000	
Actual Value	0.00	0.00	[1.000 - 2.000]	[0.000 - 2.000]	0.000	[1.000 - 2.000]	1.000	Pass
% of Calories/Total								

Standard Nutrients

Nutrients Option: All

Projected Servings Count as a Percentage: ☐ Nutrition Report categories: -- SELECT --

Serving Groups: 6-8, 9-12

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Veg	Grains	Meat/MA	MILK-F	MILK-V
Standard Value	[600.00 - 700.00]	< 10.00 % of Calories	>= 0.500	>= 0.750	>= 1.000	>= 1.000	>= 1.000	
Actual Value	0.00	0.00	[1.000 - 2.000]	[0.000 - 2.000]	0.000	[1.000 - 2.000]	1.000	Pass
% of Calories/Total								

http://.../reportviewer.aspx - Windows Internet Explorer
Generated on: 7/15/2013 3:30:20 PM

Menu Nutrient Analysis Report

Menu Name - SC-Salad Bar
Site Group - High School
Serving Group - 9-12
Meal Type - Lunch
Meal Pattern - [USDA]Meal Pattern SY 2012-2014
Calculation Method - Weighted Analysis
Result - Fail

"All" Nutrients Option

Nutrient Summary				Food Component Summary			
Nutrient	Weekly Standard Value	Actual Value	% of Calories	Food Component	Standard Value	Actual Value	% of Total
FE (Kcal)	[750.00 - 850.00]	0.00		Fruit	>= 1.000	[1.000 - 2.000]	
Fat (g)		0.00		Veg	>= 1.000	[0.000 - 2.000]	
Sfat (g)	< 10.00 % of Calories	0.00		Veg-DG		1.000	
TFat (g)(1)		0.00		Veg-RO		0.500	
Chol (mg)		0.00		Veg-BP		0.500	
Na (mg)		0.00		Veg-S		0.000	
Carb (g)		0.00		Veg-O		0.000	
TDF (g)		0.00		Grains	>= 2.000	0.000	
Pro (g)		0.00		Non-WG		0.000	
Fe (mg)		0.00		WG		0.000	
Ca (mg)		0.00		Meat/MA	>= 2.000	[1.000 - 2.000]	
A.RE		0.00		MILK-F	>= 1.000	1.000	
A.IU							
VitC (mg)							
Molc (g)							
Ash (g)							

Legend
(M) - Missing Nutrient Values
(1) Trans Fat is provided for informational purposes.

Item Name (Serving Size)	Plan Qty	FE (Kcal)	Fat
SC-Salad Bar	300		
Category: SC - Fruit; Choose: 1			
SC-Banana - LR300024 (1 CN-CUP, ma)	0	200.25	0.74

http://.../reportviewer.aspx - Windows Internet Explorer
Generated on: 7/15/2013 3:05:54 PM

Menu Nutrient Analysis Report

Menu Name - SC-Salad Bar
Site Group - High School
Serving Group - 6-8
Meal Type - Lunch
Meal Pattern - [USDA]Meal Pattern SY 2012-2014
Calculation Method - Weighted Analysis
Result - Fail

Simplified Nutrients Option

Nutrient Summary				Food Component Summary			
Nutrient	Weekly Standard Value	Actual Value	% of Calories	Food Component	Standard Value	Actual Value	% of Total
FE (Kcal)	[600.00 - 700.00]	0.00		Fruit	>= 0.500	[1.000 - 2.000]	
Sfat (g)	< 10.00 % of Calories	0.00		Veg	>= 0.750	[0.000 - 2.000]	
Na (mg)		0.00		Veg-DG		1.000	
				Veg-RO		0.500	
				Veg-BP		0.500	
				Veg-S		0.000	
				Veg-O		0.000	
				Grains	>= 1.000	0.000	
				Non-WG		0.000	
				WG		0.000	
				Meat/MA	>= 1.000	[1.000 - 2.000]	
				MILK-F	>= 1.000	1.000	
				Fruit-J		1.000	
				Grain-D		0.000	
				Vegetable-J		0.000	
				MILK-V		Pass	

Legend
(M) - Missing Nutrient Values
(1) Trans Fat is provided for informational purposes, not for monitoring purposes

Item Name (Serving Size)	Plan Qty	FE (Kcal)	Sfat (g)	Na (mg)
SC-Salad Bar	400			
Category: SC - Fruit; Choose: 1				
SC-Banana - LR300024 (1 CN-CUP, ma)	0	200.25	0.25	2.25
SC-Grapes - LR300025 (1 CN-grape)	0	1.61	0.00	0.05



Page: 1 of 2

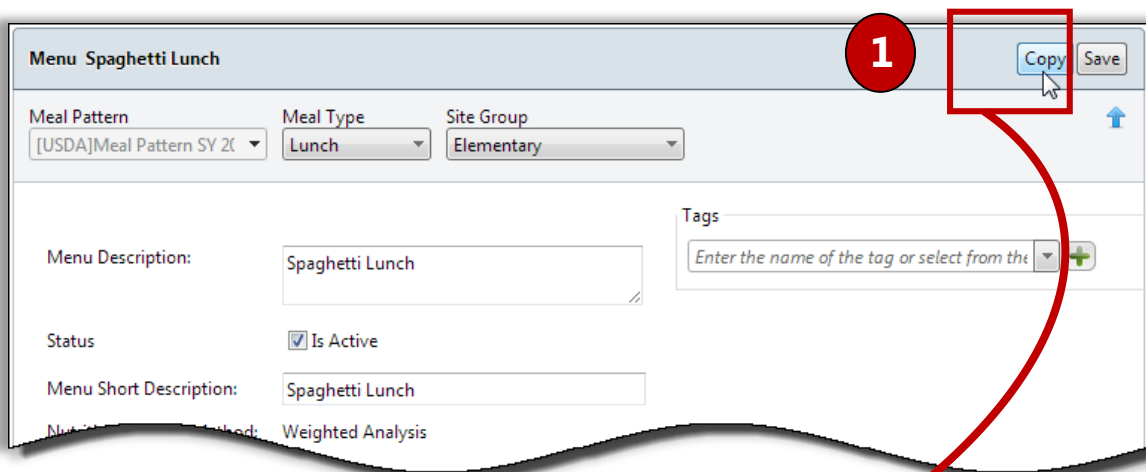
TIP

Click **Print** () in the window toolbar to print the report.

Copying a Menu

To copy a Menu

1. Display a Menu and click .
2. Enter a **Name for the menu copy** and a **Short Name for the menu copy**.
3. Select a new **Data Source**, **Meal Pattern**, **Meal Type**, and **Site Group**, if needed.
4. Click .



Menu Spaghetti Lunch

Meal Pattern: [USDA]Meal Pattern SY 20... Meal Type: Lunch Site Group: Elementary

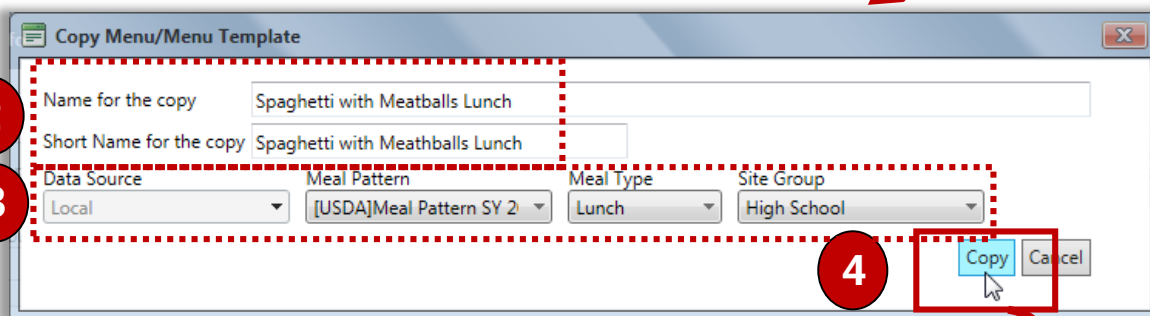
Menu Description: Spaghetti Lunch

Status: ☒ Is Active

Menu Short Description: Spaghetti Lunch

Tags: Enter the name of the tag or select from the... +

Copy Save



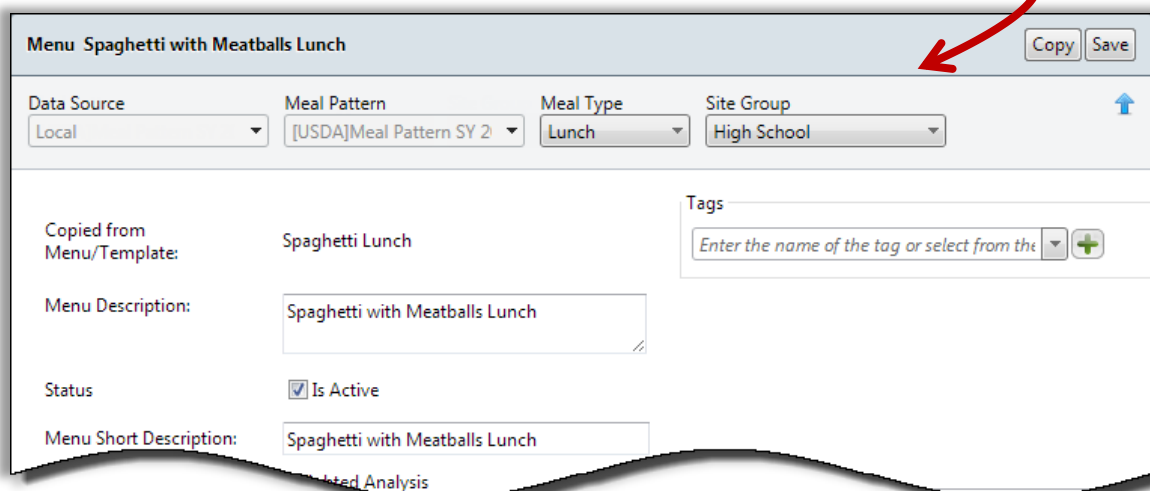
Copy Menu/Menu Template

Name for the copy: Spaghetti with Meatballs Lunch

Short Name for the copy: Spaghetti with Meathballs Lunch

Data Source: Local Meal Pattern: [USDA]Meal Pattern SY 20... Meal Type: Lunch Site Group: High School

Copy Cancel



Menu Spaghetti with Meatballs Lunch

Data Source: Local Meal Pattern: [USDA]Meal Pattern SY 20... Meal Type: Lunch Site Group: High School

Copied from Menu/Template: Spaghetti Lunch

Menu Description: Spaghetti with Meatballs Lunch

Status: ☒ Is Active

Menu Short Description: Spaghetti with Meatballs Lunch


Tags: Enter the name of the tag or select from the... +

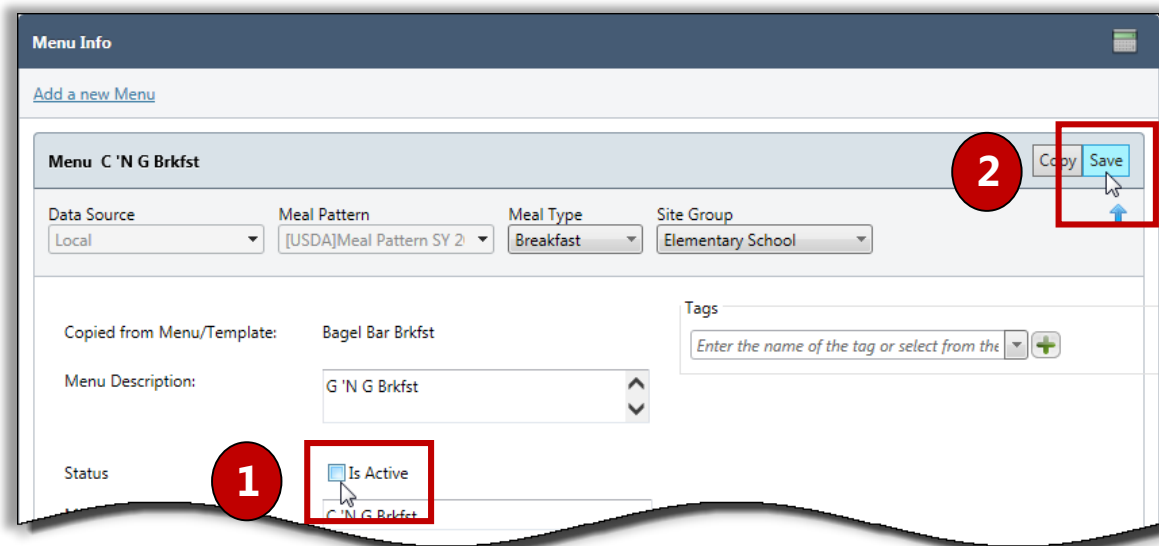
Copy Save

Discontinuing a Menu

Menus are never removed or deleted but they can be “discontinued” (made inactive) such that they do not appear in lists unless specifically specified to do so.

To discontinue a Menu

1. Display the Menu and clear **Is Active**.
2. Click .



The screenshot shows the 'Menu Info' form for a menu named 'C 'N G Brkfst'. The form includes fields for Data Source (Local), Meal Pattern ([USDA]Meal Pattern SY 2), Meal Type (Breakfast), and Site Group (Elementary School). Below these are fields for Copied from Menu/Template (Bagel Bar Brkfst), Menu Description (G 'N G Brkfst), and Tags. At the bottom, there is a Status section with an 'Is Active' checkbox. A red circle with the number '1' is placed over the 'Is Active' checkbox, and a red box highlights it. A red circle with the number '2' is placed over the 'Save' button, which is also highlighted with a red box. The 'Save' button is located next to a 'Copy' button.

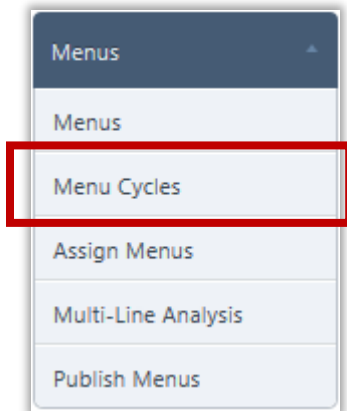
TIP

To include discontinued menus in lists, select **Include discontinued menus** in the search conditions.

To reactivate a Menu

1. Display the Menu and select **Is Active** to reapply the check mark.
2. Click .

Menu Cycles



Menu Cycles adds and maintains cycles (sets) of menus that are used to quickly assign menus for a selected period of time. Cycle Menus are planned for a set period of time and repeated on a regular basis.

Menus in a Menu Cycle are assigned by day and can be removed or added as needed. Menu Cycle details can be changed as needed.

Menu Cycle Particulars

- Menu Cycles can be made inactive (discontinued).
- Menu Cycles can include Menus that were made inactive after they were added to the Menu Cycle.
- Inactive Menus can be added to Menu Cycles.
- An inactive Menu Cycle can be copied; copy is active by default.
- To list inactive Menu Cycles in a search results, the **Include Discontinued Menu Cycles** option must be selected.

Menu Cycles Page

Menu Cycles

[Add a new Menu Cycle](#)

Data Source: -- ALL -- Meal Pattern: -- ALL -- Meal Type: -- ALL -- Site Group: -- ALL --

Name:

☐ Include Discontinued Menu cycles

Menu Cycle List						
Name	Site Group	Meal Type	Number of Weeks	Number of Days	Meal Pattern	Data Source
Regular Line	Elementary School	Lunch	1	5	[USDA]Meal Pattern SY 2012-2014	Local
Salad Line	Elementary School	Lunch	2	5	[USDA]Meal Pattern SY 2012-2014	Local
Sandwich Line	Elementary School	Lunch	1	5	[USDA]Meal Pattern SY 2012-2014	Local

By default on the **Menu Cycles** page:

- **Data Source, Meal Pattern, Meal Type, and Site Group** are set to “ALL”.
- **Name** is blank.
- **Include Discontinued Menu cycles** is cleared.

Searching for a Menu Cycle

Five separate search conditions can be used to narrow your search for a Menu Cycle or group of menu cycles. By default, active Menu Cycles are listed in the search results. To include inactive Menu Cycles, select the **Include Discontinued Menu Cycles** option.

To search for a Menu Cycle

3. Select or enter one or more search conditions.

4. Click **Apply**.

Menu Cycles

[Add a new Menu Cycle](#)

Data Source: **-- ALL --** |
 Meal Pattern: **[USDA]Meal Pattern SY 2** |
 Meal Type: **Breakfast** |
 Site Group: **Elementary School**

Name: **Bagel** |
 ☐ Include Discontinued Menu cycles |
 Apply | **Reset**

Menu Cycle List

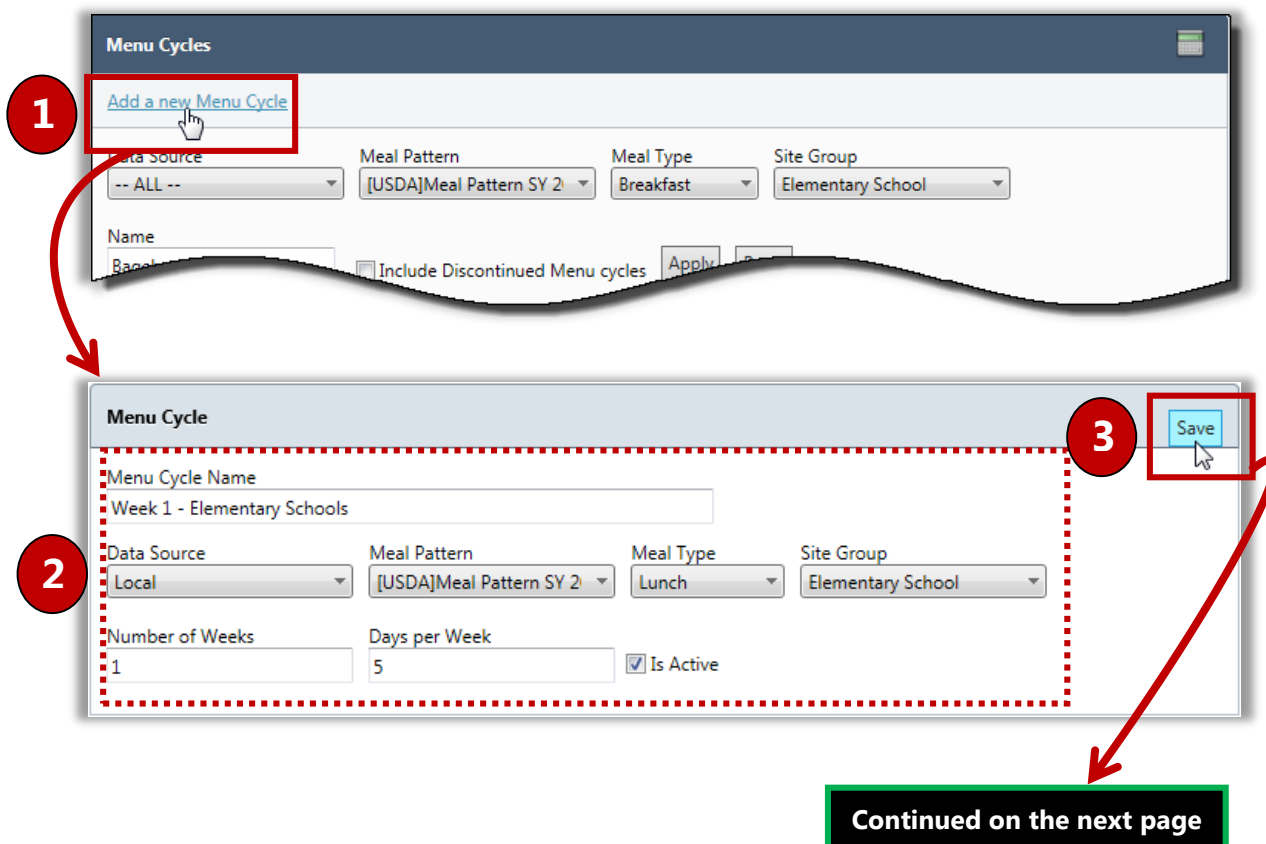
Name	Site Group	Meal Type	Number of Weeks	Number of Days	Meal Pattern	Data Source
Bagel Breakfast	Elementary School	Breakfast	1	5	[USDA]Meal Pattern SY 2012-2014	Local

Adding a Menu Cycle

After your menus are created, you are ready to create a Menu Cycle. The number of days in a Menu Cycle is set through the [Menu Cycle – Maximum Days per Cycle](#) system setting.

To add a Menu Cycle

1. Click the [Add a new Menu Cycle](#) link.
2. Select or enter the Menu Cycle details for **Name**, **Data Source**, **Meal Pattern**, **Meal Type**, **Site Group**, **Number of Weeks** and **Days per Week**
3. Click **Save**.
4. Click **Assign Menu** in the first day listing of the first week in the Menu Cycle.
5. Click a Menu name in the list of available menus; Menu name appears in Menu Cycle list.
6. Repeat step 5 for each Menu to add to the Menu Cycle; when all menus have been added for each day and week of the Menu Cycle, click **Save**.



Menu Cycle Details

Day	Name	Assign
Week: 1		
1		Assign Menu
2		Assign Menu
3		Assign Menu
4		Assign Menu

Menu List

Name	Site Group	Meal Type	Meal Pattern	Data Source	On Calendar	
> Bar-B-Que Lunch	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014	Local	True	Discontinue
> Fiesta Lunch	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014	Local	True	Discontinue
> Green Fiesta Lunch	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014	Local	True	Discontinue
> Salad Lunch	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014	Local	True	Discontinue
> Sandwich Lunch	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014	Local	False	Discontinue

Menu Cycle

Menu Cycle Name: Week 1 - Elementary Schools

Data Source: Local Meal Pattern: [USDA]Meal Pattern SY 2 Meal Type: Lunch Site Group: Elementary School

Number of Weeks: 1 Days per Week: 5 ☒ Is Active

Menu Cycle Details

Day	Name	Assign
Week: 1		
1	Fiesta Lunch	Assign Menu
2	Bar-B-Que Lunch	Assign Menu
3	Salad Lunch	Assign Menu
4	Sandwich Lunch	Assign Menu
5	Green Lunch	Assign Menu

Replacing a Menu in a Menu Cycle

To replace a Menu in a Menu Cycle

1. Display a Menu Cycle and click **Assign Menu** in the menu listing to be replaced.
2. Click a Menu name in the list of available menus.
3. Click **Save**.

Step 1: Menu Cycle Details

Day	Name	Assign
Week: 1		
1	Fiesta Lunch	Assign Menu
2	Bar-B-Que Lunch	Assign Menu

Step 2: Menu List

Name	Site Group	Meal Type	Meal Pattern	Data Source	On Calendar	
Bar-B-Que Lunch	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014	Local	True	Discontinue
Fiesta Lunch	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014	Local	True	Discontinue
Green Lunch II	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014	Local	True	Discontinue

Step 3: Menu Cycle

Menu Cycle Name:

Data Source: Meal Pattern: Meal Type: Site Group:

Number of Weeks: Days per Week: ☒ Is Active


Menu Cycle Details

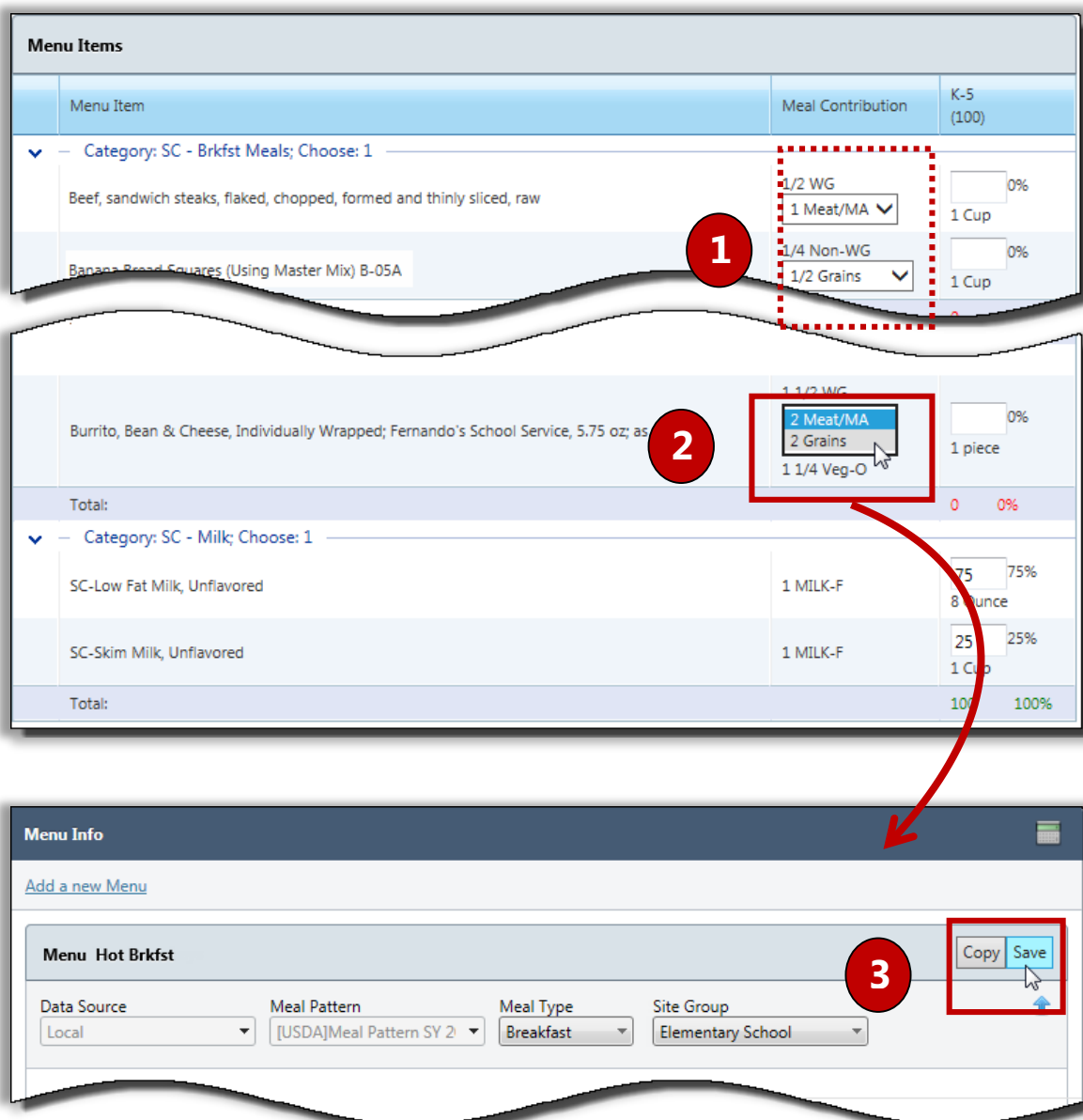
Day	Name	Assign
Week: 1		
1	Bar-B-Que Lunch	Assign Menu

Meat/Meat Alternate Grain Substitution

Grain contributions can be substituted for Meat/MA meal contributions for a **Breakfast** Menu Item.

To substitute a Grain contribution for a Meat/MA contribution

1. Display Menu Items for a Breakfast Menu; Menu Items that provide Meat/MA or Grains contributions will show an available drop-down list.
2. Select a substitution.
3. Click  .



Menu Items



Menu Item	Meal Contribution	K-5 (100)
Category: SC - Brkfst Meals; Choose: 1		
Beef, sandwich steaks, flaked, chopped, formed and thinly sliced, raw	1/2 WG 1 Meat/MA	0% 1 Cup
Banana Bread Squares (Using Master Mix) B-05A	1/4 Non-WG 1/2 Grains	0% 1 Cup
Total:		
Category: SC - Milk; Choose: 1		
SC-Low Fat Milk, Unflavored	1 MILK-F	75% 8 ounce
SC-Skim Milk, Unflavored	1 MILK-F	25% 1 Cup
Total:		
		100% 100%

Menu Info

[Add a new Menu](#)

Menu Hot Brkfst

Data Source: Local Meal Pattern: [USDA]Meal Pattern SY 2 Meal Type: Breakfast Site Group: Elementary School


3  

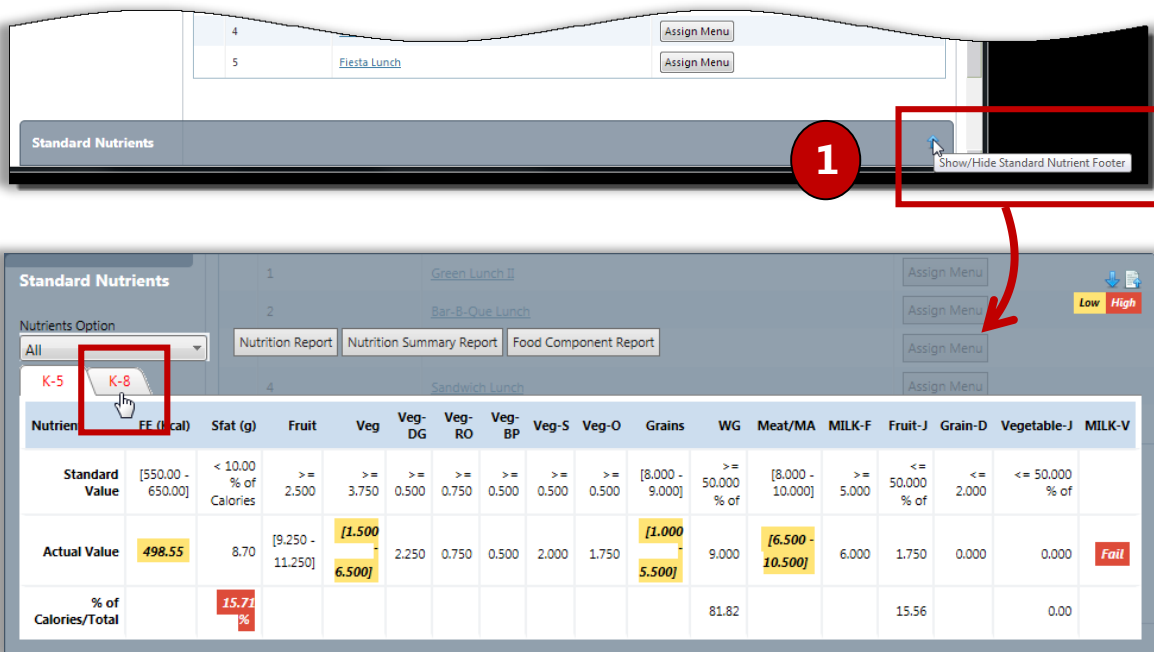
Viewing Menu Cycle Nutrients and Food Components

Each menu cycle display includes a Standard Nutrients footer. This footer provides one tab of menu cycle nutrition information for each serving group.

- Nutrient values that fall *below* the requirements for a food component are highlighted in **yellow**.
- Nutrient values that fall *above* the maximum nutritional requirements are highlighted in **red**.
- Fail** message in the **Milk-V** column indicates that the requirement for providing at least two choices (a “variety” of milks) in each meal service has not been met.

To view Standard Nutrients for a Serving Group


- Display a menu and click **Show/Hide Standard Nutrients Footer** ().
- Click a Serving Group tab to view nutrients, if needed.

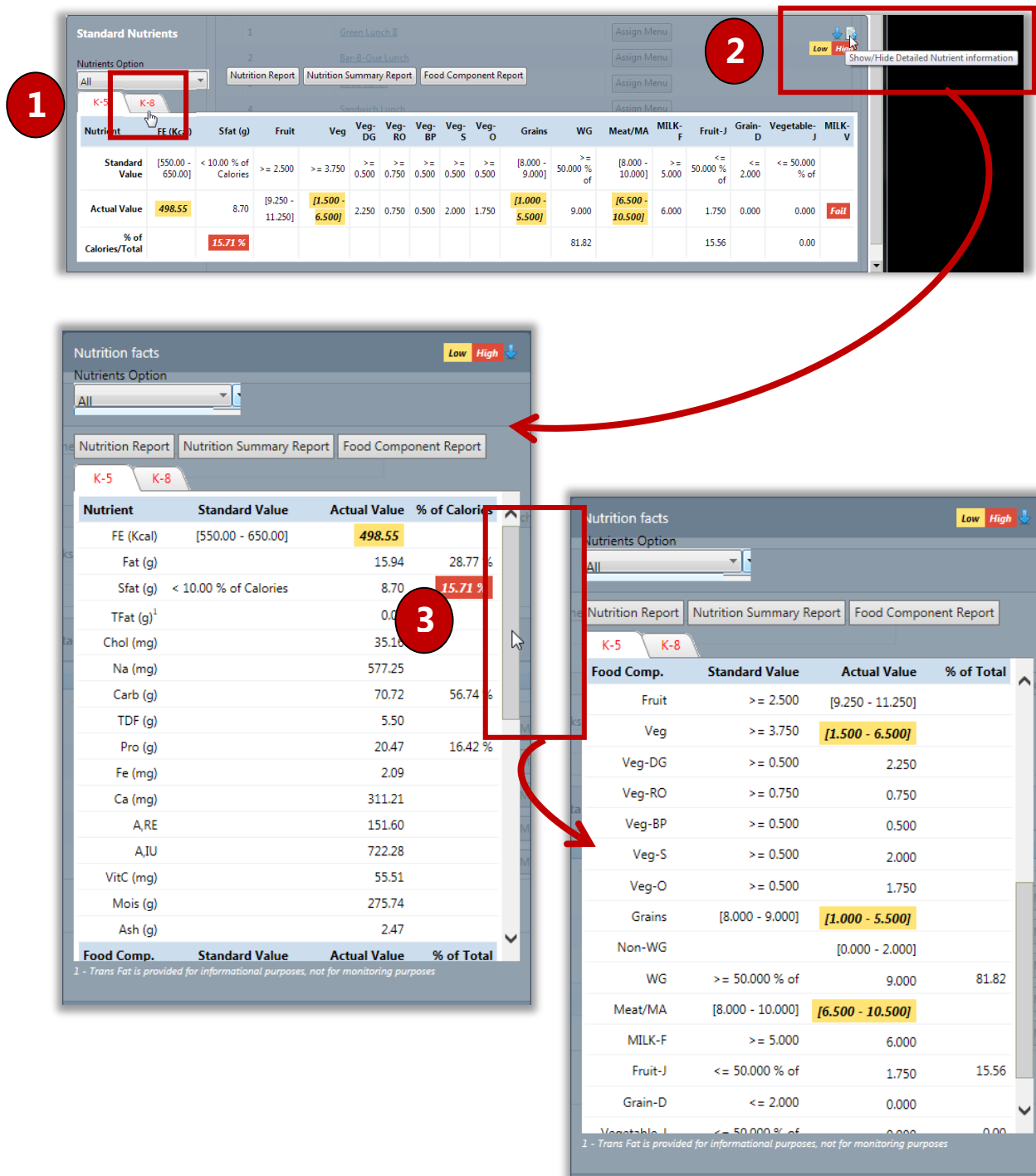


The screenshot shows the Standard Nutrients footer and the Standard Nutrients report table. The footer has a 'Show/Hide Standard Nutrient Footer' button (1). The report table shows nutrient values for various food components, with some values highlighted in yellow (below requirements) and some in red (above requirements). The Milk-V column shows a 'Fail' message.

Nutrient	FF (Cal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
Standard Value	[550.00 - 650.00]	< 10.00 % of Calories	>= 2.500	>= 3.750	>= 0.500	>= 0.750	>= 0.500	>= 0.500	>= 0.500	[8.000 - 9.000]	>= 50.000 % of	[8.000 - 10.000]	>= 5.000	<= 50.000 % of	<= 2.000	<= 50.000 % of	
Actual Value	498.55	8.70	[9.250 - 11.250]	[1.500 - 6.500]	2.250	0.750	0.500	2.000	1.750	[1.000 - 5.500]	9.000	[6.500 - 10.500]	6.000	1.750	0.000	0.000	Fail
% of Calories/Total		15.71 %									81.82			15.56		0.00	

To view Standard Nutrients details for a Serving Group

1. Display a menu and click a Serving Group tab to view nutrients.
2. Click **Show / Hide Detailed Nutrients Information** ().
3. Scroll to view Food Component details.



Step 1: In the 'Standard Nutrients' window, select the serving group 'K-8' from the 'Nutrients Option' dropdown.

Step 2: Click the 'Show/Hide Detailed Nutrient information' button (indicated by a red box and arrow).

Step 3: The 'Nutrition facts' window displays the following data:

Nutrient	Standard Value	Actual Value	% of Calories
FE (Kcal)	[550.00 - 650.00]	498.55	
Fat (g)		15.94	28.77 %
Sfat (g)	< 10.00 % of Calories	8.70	15.71 %
TFat (g) ¹		0.00	
Chol (mg)		35.16	
Na (mg)		577.25	
Carb (g)		70.72	56.74 %
TDF (g)		5.50	
Pro (g)		20.47	16.42 %
Fe (mg)		2.09	
Ca (mg)		311.21	
A,RE		151.60	
A,IU		722.28	
VitC (mg)		55.51	
Mois (g)		275.74	
Ash (g)		2.47	

Food Component Details:

Food Comp.	Standard Value	Actual Value	% of Total
Fruit	>= 2,500	[9.250 - 11.250]	
Veg	>= 3,750	[1.500 - 6.500]	
Veg-DG	>= 0.500	2.250	
Veg-RO	>= 0.750	0.750	
Veg-BP	>= 0.500	0.500	
Veg-S	>= 0.500	2.000	
Veg-O	>= 0.500	1.750	
Grains	[8.000 - 9.000]	[1.000 - 5.500]	
Non-WG		[0.000 - 2.000]	
WG	>= 50.000 % of	9.000	81.82
Meat/MA	[8.000 - 10.000]	[6.500 - 10.500]	
MILK-F	>= 5.000	6.000	
Fruit-J	<= 50.000 % of	1.750	15.56
Grain-D	<= 2.000	0.000	
Vegetable-J	<= 50.000 % of	0.000	0.00

1 - Trans Fat is provided for informational purposes, not for monitoring purposes

Generating a Menu Cycle Week Nutrient Analysis Report

The Menu Nutrient Analysis Report displays either detailed nutrition information for “All” nutrients or “simplified” information that only includes:

Calories Saturated Fat Calcium

Highlighted report values include

- Nutrient values that fall *within* the requirements *for the week* are shown in green in the **Actual Value** column;
- Nutrient values that fall *outside* (above or below) the requirements *for the week* are shown in *red* in the **Actual Value** column.

The default **Nutrient Option** selection is “All”; the default value for this selection is set through the [Default Nutrients Option](#) system setting.

To view Standard Nutrients analysis for a Serving Group

1. Show the Standard Nutrients footer for a menu.
2. Select a Serving Group, if needed.
3. Select a Nutrients Option, if needed.

4. Click **Nutrition Report**.

Standard Nutrients

Nutrients Option: All

1. Show/Hide Detailed Nutrient information

2. Nutrient

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
Standard Value	[550.00 - 650.00]	< 10.00 % of Calories	>= 2.500	>= 3.750	>= 0.500	>= 0.750	>= 0.500	>= 0.500	>= 0.500	[8.000 - 9.000]	>= 50.000 % of	[8.000 - 10.000]	>= 5.000	<= 50.000 % of	<= 2.000	<= 50.000 % of	
Actual Value	498.55	8.70	[9.250 - 11.250]	[1.500 - 6.500]	2.250	0.750	0.500	2.000	1.750	[1.000 - 5.500]	9.000	[6.500 - 10.500]	6.000	1.750	0.000	0.000	Fail
% of Calories/Total		15.71 %									81.82			15.56		0.00	

Standard Nutrients

Nutrients Option: Simplified

3. Nutrients Option

4. Nutrition Report

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
Standard Value	[550.00 - 650.00]	< 10.00 % of Calories	>= 2.500	>= 3.750	>= 0.500	>= 0.750	>= 0.500	>= 0.500	>= 0.500	[8.000 - 9.000]	>= 50.000 % of	[8.000 - 10.000]	>= 5.000	<= 50.000 % of	<= 2.000	<= 50.000 % of	
Actual Value	498.55	8.70	[9.250 - 11.250]	[1.500 - 6.500]	2.250	0.750	0.500	2.000	1.750	[1.000 - 5.500]	9.000	[6.500 - 10.500]	6.000	1.750	0.000	0.000	Fail
% of Calories/Total		15.71 %									81.82			15.56		0.00	

Menu Cycle Week Nutrient Analysis Report

Menu Cycle Name - Week 1 - Elementary Schools
 Site Group - Elementary School
 Serving Group - K-8
 Meal Type - Lunch
 Week - 1

Meal Pattern - [USDA]Meal Pattern SY 2012-2014
 Calculation Method - Weighted Analysis
 Result - Fail

"All" Nutrients Option

Cycle Week Nutrient Summary				Cycle Week Food Component Summary			
Nutrient	Weekly Standard Value	Actual Value	% of Calories	Food Component	Standard Value	Actual Value	% of Total
FE (Kcal)	[600.00 - 650.00]	0.00		Fruit	>= 2.500	[2.000 - 2.500]	
Fat (g)		0.00		Veg	>= 3.750	[0.000 - 2.000]	
Sfat (g)	< 10.00 % of Calories	0.00		Veg-DG	>= 0.500	1.000	
TFat (g)(1)		0.00		Veg-RO	>= 0.750	0.500	
Chol (mg)		0.00		Veg-BP	>= 0.500	0.500	
Na (mg)		0.00		Veg-S	>= 0.500	0.000	
Carb (g)		0.00		Veg-O	>= 0.500	0.000(a)	
TDF (g)		0.00		Grains	[8.000 - 9.000]	0.000	
Pro (g)		0.00		Non-WG		0.000	
Fe (mg)		0.00		WG	>= 50.000 % of	0.000	
Ca (mg)							
A,RE							
A,IU							
VitC (mg)							
Mois (g)							
Ash (g)							

Legend
 (M) - Missing Nutrient Values
 (1) Trans Fat is provided for informational purposes, not for
 (a) Requirement is being met with additional amounts from

Item Name (Serving Size)	Plan Qty	FE (Kcal)	Fat (g)	Sf
Green Lunch II - Day: 1	100			
Category: SC - Fruit; Choose: 2				

Menu Cycle Week Nutrient Analysis Report

Menu Cycle Name - Week 1 - Elementary Schools
 Site Group - Elementary School
 Serving Group - K-8
 Meal Type - Lunch
 Week - 1

Meal Pattern - [USDA]Meal Pattern SY 2012-2014
 Calculation Method - Weighted Analysis
 Result - Fail

"Simplified" Nutrients Option

Cycle Week Nutrient Summary				Cycle Week Food Component Summary			
Nutrient	Weekly Standard Value	Actual Value	% of Calories	Food Component	Standard Value	Actual Value	% of Total
FE (Kcal)	[600.00 - 650.00]	0.00		Fruit	>= 2.500	[2.000 - 2.500]	
Sfat (g)	< 10.00 % of Calories	0.00		Veg	>= 3.750	[0.000 - 2.000]	
Na (mg)		0.00		Veg-DG	>= 0.500	1.000	
				Veg-RO	>= 0.750	0.500	
				Veg-BP	>= 0.500	0.500	
				Veg-S	>= 0.500	0.000	
				Veg-O	>= 0.500	0.000(a)	
				Grains	[8.000 - 9.000]	0.000	
				Non-WG		0.000	
				WG	>= 50.000 % of	0.000	
				Meat/MA	[9.000 - 10.000]	[1.000 - 2.000]	
				MILK-F	>= 5.000	1.000	
				Fruit-J	<= 50.000 % of	0.000	0.00
				Grain-D	<= 2.000	0.000	
				Vegetable-J	<= 50.000 % of	0.000	0.00
				MILK-V		Fail	

Legend
 (M) - Missing Nutrient Values
 (a) Requirement is being met with additional amounts from the dark green, red/orange, and beans/peas vegetable subgroups.

Item Name (Serving Size)	Plan Qty	FE (Kcal)	Sfat (g)	Na (mg)
Green Lunch II - Day: 1	100			
Category: SC - Fruit; Choose: 2				

Page: 1 of 2

TIP

Click **Print** () on the window toolbar to print the report.

Generating a Menu Cycle Week Nutrient Summary Report

The Menu Cycle Week Nutrient Summary Report displays the daily totals, the average daily value (Actual Value), and the percentage of total weekly calories for each nutrient.

- Weekly calorie values that fall *outside* (above or below) the weekly requirements are shown in **red** in **Actual Value**.
- Saturated Fat values that fall *below* the weekly requirements are shown in **green** in **Actual Value** and **% of Calories**.

To view the Menu Cycle Week Nutrient Summary Report for a Serving Group

- Display the Standard Nutrients footer for a menu and select a Serving Group, if needed.
- Click **Nutrition Summary Report**.

Standard Nutrients

Nutrients Option: All

Nutrition Report: **Nutrition Summary Report** Food Component Report

1 K-5 K-8

2 Nutrition Summary Report

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Grains	WG	MILK-F	Fruit-J	Grain-D	MILK-V
Standard Value	[350.00 - 500.00]	< 10.00 % of Calories	>= 1.50	[4,000 - 6,000]	>= 50.00 % of	>= 3,000	<= 50.00 % of	<= 2,000	
Actual Value									
% of Calories/Total									

Menu Cycle Week Nutrient Summary Report

Menu Cycle Name - Fresh Fruit & Salads

Site Group - Elementary Schools Site Group

Serving Group - K-8

Meal Type - Lunch

Week - 1

Meal Pattern - [USDA]Meal Pattern SY 2012-2014

Calculation Method - Weighted Analysis

Nutrient	Day 1	Day 2	Day 4	Week Standard Value	Actual Value	% of Calories
FE (Kcal)	232.14	232.14	203.99	[600.00 - 650.00]	133.66	
Fat (g)	5.95 (23.08%)	5.95 (23.08%)	8.27 (36.47%)		4.03	27.17%
Sfat (g)	1.49 (5.77%)	1.49 (5.77%)	0.83 (3.66%)	< 10.00 % of Calories	0.76	5.13%
TFat (g)(1)	1.19	1.19	0.24		0.52	
Chol (mg)	7.14	7.14	9.80		4.82	
Na (mg)	185.71	185.71	291.23		132.53	
Carb (g)	11.31 (19.49%)	11.31 (19.49%)	16.27 (31.90%)		7.78	23.28%
TDF (g)	1.79	1.79	1.44		1.00	
Pro (g)	9.52 (16.41%)	9.52 (16.41%)	13.28 (26.04%)		6.47	19.35%
Fe (mg)	1.83	1.83	1.22		0.98	
Ca (mg)	1.19	1.19	1.20		0.72	
A,RE	13.10	13.10	21.07		9.45	
A,IU	60.71	60.71	99.89		44.26	
VitC (mg)	1.19	1.19	0.63		0.60	
Mois (g)	1.19	1.19	4.08		1.29	
Ash (g)	1.19	1.19	0.31		0.54	

Calories

Saturated Fat

Legend

(M) - Missing Nutrient Values

(1) - Trans Fat is provided for informational purposes, not for monitoring purposes

Page: 1 of 1

Generating a Weekly Food Component Report

The Weekly Food Component Report displays daily values and weekly totals for each required food component along with a Pass / Fail weekly check for component requirements. Details of component sub-categories appear below the component summary information, such as Dark Green, Red/Orange, etc., for the Vegetables component.

Highlighted report values include

- Nutrient values for a food component that fall *within* the requirements for the day are shown in **green**;
- Nutrient values for a food component that fall *within* the requirements for the week display “**Pass**” in the **Weekly Requirement Check** column;
- Nutrient values for a food component that fall *outside* (above or below) the requirements for the day are highlighted in **red**.
- Nutrient values for a food component that fall *outside* (above or below) the requirements for the week display “**Fail**” in the **Weekly Requirement Check** column.

If Grains have been substituted for Meat/Meat Alternate components, the Weekly Food Component Report includes two extra lines of information in the Grains group:

- Actual Grains – actual grain amounts (Grains not acting as M/MA)
- M/MA acting as Grains – substitution amounts

To view the Weekly Food Component Report for a Serving Group

1. Display the Standard Nutrients footer for a menu and select a Serving Group, if needed.

2. Click **Food Component Report**.

	FE (Kcal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
Standard Value	[550.00 - 650.00]	< 10.00 % of Calories	>= 2.500	>= 3.750	>= 0.500	>= 0.750	>= 0.500	>= 0.500	>= 0.500	[8.000 - 9.000]	>= 50.000 % of	[8.000 - 10.000]	>= 5.000	<= 50.000 % of	<= 2.000	<= 50.000 % of	
Actual Value	498.55	8.70	[9.250 - 11.250]	[1.500 - 6.500]	2.250	0.750	0.500	2.000	1.750	[1.000 - 5.500]	9.000	[6.500 - 10.500]	6.000	1.750	0.000	0.000	Fail
% of Calories/Total		15.71 %									81.82			15.56		0.00	

Continued on the next page

Section 3: Menus

http:// reportviewer.aspx - Windows Internet Explorer

Generated on: 08/26/2013 02:06:21 PM

Weekly Food Component Report

Menu Cycle Name - Breakfast Grill
 Site Group - Elementary School Meal Pattern - [USDA]Meal Pattern SY 2012-2014
 Serving Group - K-5 Meal Type - Breakfast
 Week - 1

Fruit (cups)	Day 1	Day 2	Day 3	Weekly Total	Weekly Requirement	Weekly Requirement Check
Minimum Fruits (cups)	2.500 (Pass)	2.500 (Pass)	2.500 (Pass)	7.500	≥ 1.500	Pass

Weekly Fruit Juice Limit Requirement	Total Weekly Fruit	Total Weekly Fruit Juice	Percent of Total Weekly Fruit that is Juice	Weekly Requirement Check
≥ 50.000 % of	7.500	3.000	40.000%	Pass

Vegetables (cups)	Day 1	Day 2	Day 3	Weekly Total	Weekly Requirement	Weekly Requirement Check
Vegetables (cups)	1.500	1.500	1.500	4.500	≥ 0.00	Pass
Dark Green	0.250	0.250	0.250	0.750	≥ 0.00	Pass
Red/Orange	0.000	0.000	0.000	0.000	≥ 0.00	Pass
Beans/Peas (Legumes)	0.000	0.000	0.000	0.000	≥ 0.00	Pass
Starchy	0.000	0.000	0.000	0.000	≥ 0.00	Pass
Other	1.250	1.250	1.250	3.750	≥ 0.00	Pass

Weekly Vegetable Juice Limit Requirement	Total Weekly Vegetables	Total Weekly Vegetable Juice	Percent of Total Weekly Vegetables that is Juice	Weekly Requirement Check
≥ 0.00 %	4.500	0.000	0.00%	Pass

Meat / Meat Alternate (oz eq.)	Day 1	Day 2	Day 3	Weekly Total	Weekly Requirement	Weekly Requirement Check
Meat/Meat Alternates (oz eq.)	0.000	0.000	0.000	0.000	≥ 0.00	Pass

Grains (oz eq.)	Day 1	Day 2	Day 3	Weekly Total	Weekly Requirement	Weekly Requirement Check
Grains (oz eq.)	[4.250 - 5.000] (Pass) (a)	[4.250 - 5.000] (Pass) (a)	[4.250 - 5.000] (Pass) (a)	[12.750 - 15.000] (a)	[4.000 - 6.000]	Fail (a)
Actual Grains	[1.750 - 2.000]	[1.750 - 2.000]	[1.750 - 2.000]			
M/MA acting as Grains	[2.500 - 3.000]	[2.500 - 3.000]	[2.500 - 3.000]			

Weekly Whole Grain Rich	Weekly Grains Total	Weekly Whole Grain Rich Total	Percent of Whole Grain Rich	At Least Half Whole Grain Rich	Grain Based Dessert Total for All Weekly Meals	No More Than 2oz eq. of Grain Based Desserts
≥ 50.000 % of	6.750	6.000	88.889%	Pass	0.000	Pass

(a) Schools may substitute 1 oz. M/MA for Grains after the minimum daily Grains requirement is met.


Milk (cups)	Day 1	Day 2	Day 3	Weekly Total	Weekly Requirement	Weekly Requirement Check
Minimum Fluid Milk (cups)	2.000 (Pass)	2.000 (Pass)	2.000 (Pass)	6.000	≥ 3.000	Pass
Skim/fat-free, unflavored; Skim/fat-free, flavored; Low-fat (1% or less), unflavored	Pass	Pass	Pass			
Low-fat (1% or less), flavored						
Reduced fat (2% fat) or whole, unflavored and flavored						

*USDA is offering flexibility for SY 2012-2013 and SY 2013-2014 by allowing SFAs to exceed the maximum amount of grains and meat/meat meal alternates as long as the daily and weekly minimums for these components are met and the calories are within the required range. If you exceed the weekly maximum for grain and/or meat/meat alternates, your report will say that you fail for those categories, but that is acceptable at this time.

Page: 1 of 1

Substitutions

TIP

- Click **Print** () in the window toolbar to print the report.

Copying a Menu Cycle

To copy a Menu Cycle

1. Display a Menu Cycle and click **Copy**.
2. Enter a **Name for the copy**.
3. Make changes to **Data Source**, **Meal Pattern**, **Meal Type**, **Site Group**, **Number of Weeks**, and **Days per Week**.
4. Click **Copy**.

Menu Cycle

Menu Cycle Name
Breakfast Grill

Data Source: Local Meal Pattern: [USDA]Meal Pattern SY 2 Meal Type: Breakfast Site Group: Elementary School

Number of Weeks: 2 Days per Week: 3 ☒ Is Active

Menu Cycle Details

Day	Name	Assign
Week: 1		
1	Hot Breakfast	Assign Menu
2	Hot Breakfast	Assign Menu
3	Hot Breakfast	Assign Menu

Copy Menu Cycle

Name for the copy: Southwest Grill

Data Source: Local Meal Pattern: [USDA]Meal Pattern SY 2 Meal Type: Breakfast Site Group: Elementary School


Number of Weeks: 2 Days per Week: 3

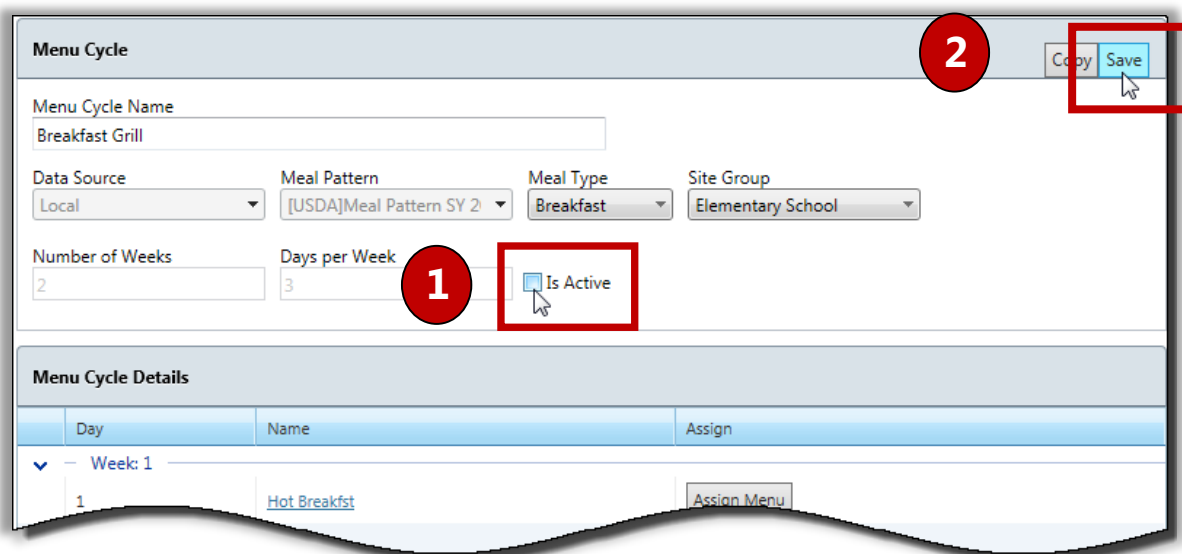
Copy **Cancel**

Discontinuing a Menu Cycle

Menu Cycles are never removed or deleted but they can be “discontinued” (made inactive) such that they do not appear in lists unless specifically specified to do so.

To discontinue a Menu Cycle

1. Display a Menu Cycle and clear **Is Active**.
2. Click .




The screenshot shows the 'Menu Cycle' form. At the top right, a red circle with the number '2' highlights the 'Copy' and 'Save' buttons, with a red box around the 'Save' button. In the middle section, a red circle with the number '1' highlights the 'Is Active' checkbox, which is currently unchecked. The form includes fields for 'Menu Cycle Name' (Breakfast Grill), 'Data Source' (Local), 'Meal Pattern' ([USDA]Meal Pattern SY 2), 'Meal Type' (Breakfast), 'Site Group' (Elementary School), 'Number of Weeks' (2), and 'Days per Week' (3). Below these fields is a section titled 'Menu Cycle Details' which contains a table with columns 'Day', 'Name', and 'Assign'. The table shows 'Week: 1' with a row for '1' and 'Hot Breakfast', and an 'Assign Menu' button.

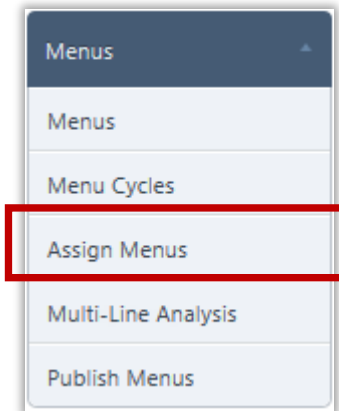
TIP

To include discontinued menu cycles in lists, select the **Include Discontinued Menu cycles** option in the search conditions on the **Menu Cycles** page.

To reactivate a Menu Cycle

1. Display the Menu Cycle and select **Is Active** to reapply the check mark.
2. Click .

Assign Menus



Assign Menu allows you to assign a menu or menu cycle to a calendar date.

Menus / menu cycles can be replaced, or they can be completely removed from a calendar date.

Assign Menu Page

A screenshot of the 'Assign Menu' page. The page has a dark blue header with the title 'Assign Menu'. Below the header, there are four input fields: 'Meal Type' with a dropdown menu showing '-- SELECT --', 'Site Group' with a dropdown menu showing '-- SELECT --', 'Site' with a text input field, and 'Menu Line' with a dropdown menu. The page has a light gray background and a dark blue border.

By default on the **Assign Menu** page:

- **Meal Type** and **Site Group** are set to “Select”.
- **Site** and **Menu Line** are blank.

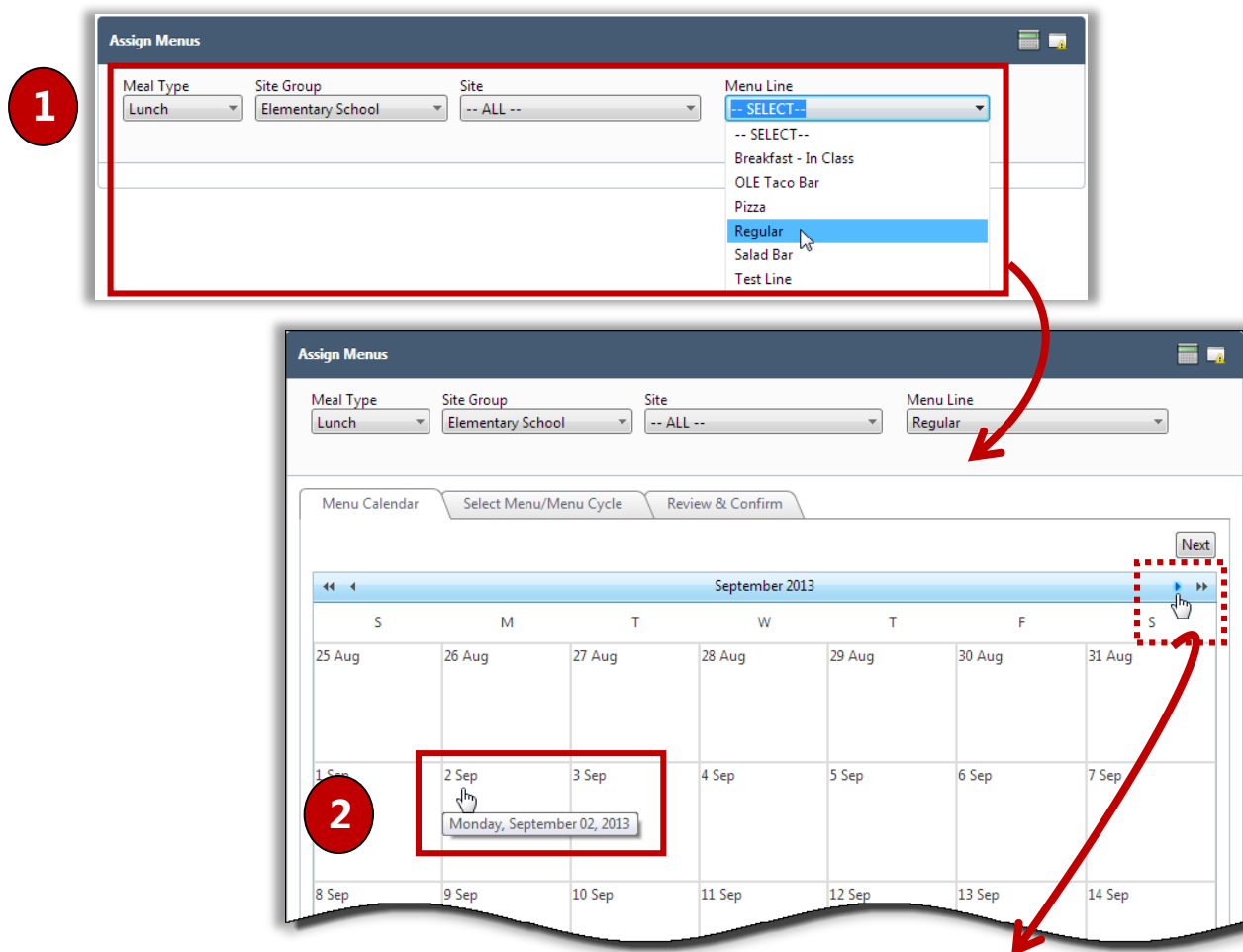
Assigning a Menu Cycle

When Menus and Menu Cycles are complete, they are assigned to a Menu Calendar. Menu calendars are automatically set up by Meal Type, Site Group, Site, and Menu Line. These conditions are selected to then display a menu calendar. By default, the Menu Calendar for the current month is shown. To move to a different calendar month, use these calendar controls:

- ◀ Move back one month
- ▶▶ Move to the *last viewed* future month.
- ▶ Move forward one month
- ◀◀ Move to the *last viewed* past month.

To assign a Menu Cycle to a Menu Calendar

1. Select a **Meal Type** and **Site Group**, and **Menu Line**; select a **Site**, if needed.
2. Move to a different calendar month, if needed, and click a calendar date.
3. Select a Menu Cycle in the **Menu Cycles** list and click **Next**.
4. Review the Serving Dates on which the menus will be assigned and click **Assign**.



Continued on the next page

Menu Cycles							
Select	Name	Name	Site Group	Meal Type	Number of Weeks	Meal Pattern	
>	January Elementary Lunch	January Elementary Lunch	Elementary School	Lunch	1	[USDA] Traditional Meal Pattern	
>	Test Menu Cycle default1	Test Menu Cycle default1	Elementary School	Lunch	1	[USDA] Meal Pattern SY 2012-2014	
>	Week 1 - Elementary Schools	Week 1 - Elementary Schools	Elementary School	Lunch	1	[USDA] Meal Pattern SY 2012-2014	

3

Next

Menu Calendar Select Menu/Menu Cycle Review & Confirm

Back

Selected Date:
Menu Cycle: Week 1 - Elementary Schools Start Cycle on 9/2/2013 ☒ Skip Holidays ☒ Skip Weekends ☐ Use All Menus ☒ Override Assigned Menus Apply

Serving Date	Day	Menu	Existing Menu
9/2/2013	Monday	Bar-B-Que Lunch	Green Lunch II
9/3/2013	Tuesday	Bar-B-Que Lunch	Bar-B-Que Lunch
9/4/2013	Wednesday	Salad Lunch	Salad Lunch

Site Name	Site Group	Effective Date	End Date
	Elementary School	10/5/2011	
ELEMENTARY SCHOOL	Elementary School	4/11/2012	
ELEMENTARY SCHOOL	Elementary School	3/6/2013	

Back

4

Assign

Menu cycle assigned successfully.

Assign Menus

Meal Type: Lunch Site Group: Elementary School Site: -- ALL -- Menu Line: Regular

Menu Calendar Select Menu/Menu Cycle Review & Confirm

Next

September 2013

S	M	T	W	T	F	S
25 Aug	26 Aug	27 Aug	28 Aug	29 Aug	30 Aug	31 Aug
1 Sep	2 Sep Green Lunch II	3 Sep Bar-B-Que Lunch	4 Sep Salad Lunch	5 Sep Sandwich Lunch	6 Sep Fiesta Lunch	7 Sep

Three options are available on the **Review & Confirm** tab to specify how to assign the menus in the menu cycle to accommodate Holidays and Weekend Days:

- **Skip Weekends** – when selected:
 - * Menus are not assigned to weekend days (Saturday and Sunday).
 - * Unassigned (“leftover”) menu(s) from the Menu Cycle are assigned to the next available date(s)
 - * *Option is selected by default.*

For example

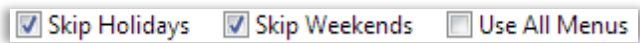
1. If you assign Menu Cycle X which includes five (5) menus:



2. To this week starting on Tuesday the 3rd:

Sun 1	Mon 2	Tues 3	Wed 4	Thurs 5	Fri 6	Sat 7
Sun 8	Mon 9	Tues 10	Wed 11	Thurs 12	Fri 13	Sat 14

3. With these options selected:



This is how the assigned Menu Cycle X appears on the Menu Calendar:

Sun 1	Mon 2	Tues 3 Menu A	Wed 4 Menu B	Thurs 5 Menu C	Fri 6 Menu D	Sat 7
Sun 8	Mon 9 Menu E	Tues 10	Wed 11	Thurs 12	Fri 13	Sat 14

Notice that **Menu E** is assigned to the next available date.

- **Skip Holidays** – when selected
 - * Menus are not assigned to days designated as holidays; holidays are set up through **Configuration > Holiday Schedule**
 - * Unassigned Menus are discarded (not assigned to the next available date)
 - * *Option is selected by default.*

For example

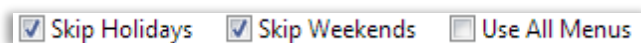
1. If you assign Menu Cycle X which includes five (5) menus:



2. To this calendar starting on Tuesday the 3rd:

Sun 1	Mon 2	Tues 3	Wed 4	Thurs 5	Fri 6	Sat 7
				Holiday	Holiday	
Sun 8	Mon 9	Tues 10	Wed 11	Thurs 12	Fri 13	Sat 14

3. With these options selected:



This is how the assigned Menu Cycle X appears on the Menu Calendar:

Sun 1	Mon 2	Tues 3	Wed 4	Thurs 5	Fri 6	Sat 7
		Menu A	Menu B	Holiday	Holiday	
Sun 8	Mon 9	Tues 10	Wed 11	Thurs 12	Fri 13	Sat 14
	Menu E					

Menu C and **Menu D** are not assigned to any day of the selected week or any other week, i.e., they are *discarded*.

Menu E is assigned to the next available day on the Menu Calendar.

- **Use All Menus** – when selected
 - * Any unassigned Menus are assigned to the next available day
 - * *Option is not selected by default.*

For example

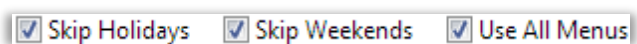
1. If you assign Menu Cycle X which includes five (5) menus:



2. To this calendar starting on Tuesday the 3rd :

Sun 1	Mon 2	Tues 3	Wed 4	Thurs 5	Fri 6	Sat 7
				Holiday	Holiday	
Sun 8	Mon 9	Tues 10	Wed 11	Thurs 12	Fri 13	Sat 14

3. With these options selected:



This is how the assigned Menu Cycle X appears on the Menu Calendar:

Sun 1	Mon 2	Tues 3	Wed 4	Thurs 5	Fri 6	Sat 7
		Menu A	Menu B	Holiday	Holiday	
Sun 8	Mon 9	Tues 10	Wed 11	Thurs 12	Fri 13	Sat 14
	Menu C	Menu D	Menu E			

All Menus in Menu Cycle X are assigned to a date. Compare this calendar with the calendar on the previous page to see how selecting **Use All Menus** changes the menu assignment.

- **Override Assigned Menus**—this option only appears when an existing menu will be overridden with a new menu assignment; when selected
 - * Menus currently assigned to the Menu Calendar will be replaced with new menus from the Menu Cycle being assigned.
 - * *Option is selected by default.*

For example,

1. If you assign Menu Cycle X which includes five (5) menus:



2. To this calendar starting on Tuesday the 3rd where Menus are currently assigned to Monday the 9th through Friday the 13th:

Sun 1	Mon 2	Tues 3	Wed 4	Thurs 5	Fri 6	Sat 7
				Holiday	Holiday	
Sun 8	Mon 9	Tues 10	Wed 11	Thurs 12	Fri 13	Sat 14
	Menu 1	Menu 2	Menu 3	Menu 4	Menu 5	

3. With these options selected:

☒ Skip Holidays
 ☒ Skip Weekends
 ☒ Use All Menus
 ☒ Override Assigned Menus

This is how the assigned week appears in the Menu Calendar:

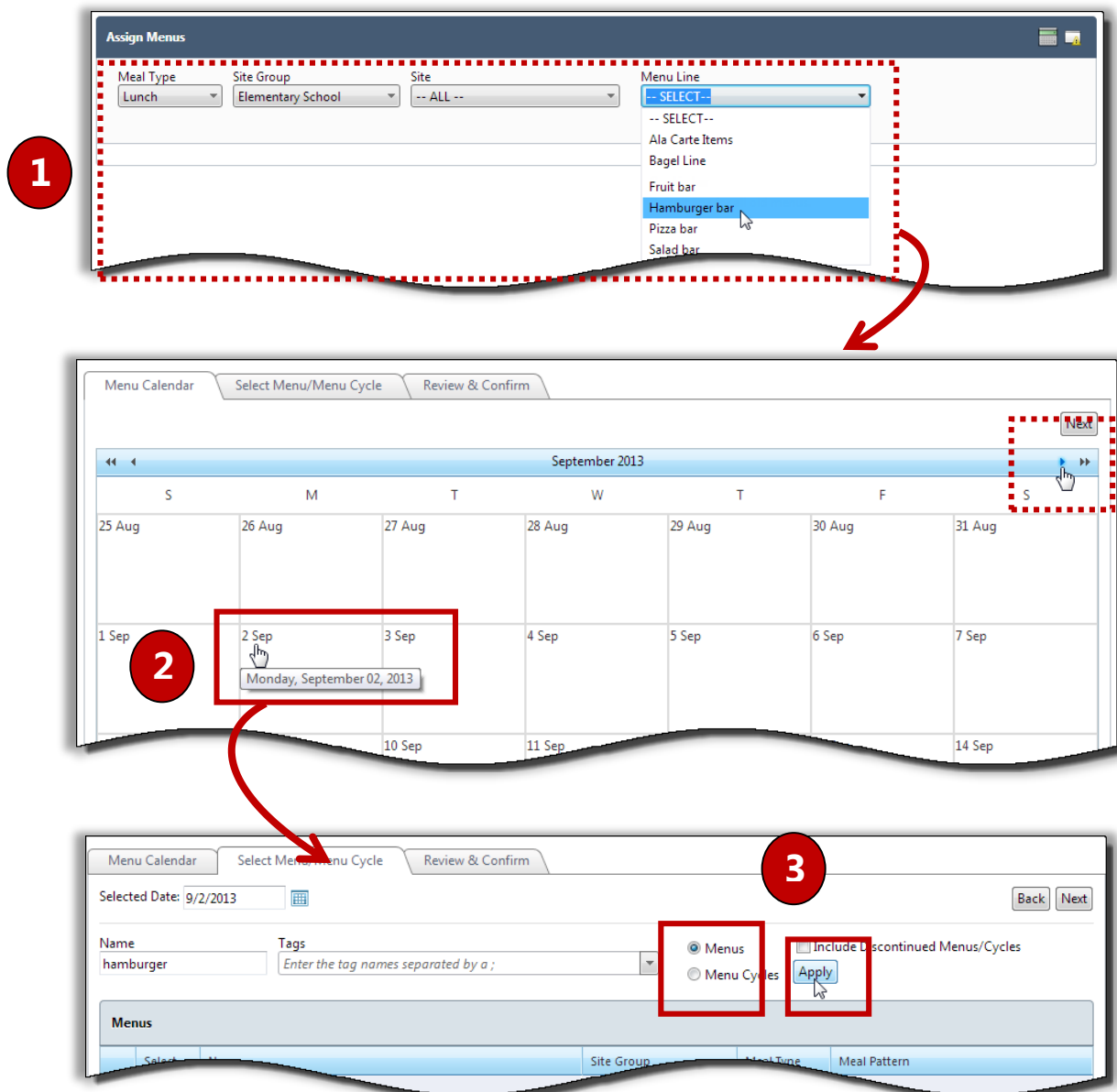
Sun 1	Mon 2	Tues 3	Wed 4	Thurs 5	Fri 6	Sat 7
		Menu A	Menu B	Holiday	Holiday	
Sun 8	Mon 9	Tues 10	Wed 11	Thurs 12	Fri 13	Sat 14
	Menu C	Menu D	Menu E	Menu 4	Menu 5	

All Menus in Menu Cycle X are assigned to a date where **Menu C**, **Menu D** and **Menu E** override **Menu 1**, **Menu 2**, and **Menu 3**. Notice that **Menu 4** and **Menu 5** remain from the original assignment. Compare this calendar with the calendar on the previous page to see how selecting **Override Assigned Menus** changes the menu assignment.


Assigning a Menu

To assign a Menu

1. Select a **Meal Type** and **Site Group**, and **Menu Line**; select a **Site**, if needed.
2. Move to a different calendar month if needed and click a calendar date.
3. Click **Menus** and click **Apply**.
4. Select a Menu in the Menus list and click **Next**.
5. Review the Serving Dates on which the menus will be assigned and click **Assign**.



Menu Calendar Select Menu/Menu Cycle Review & Confirm

Selected Date: 9/2/2013 

Back Next

Name: hamburger Tags: ☒ Menus ☐ Include Discontinued Menus/Cycles
☐ Menu Cycles Apply

Select	Name	Site Group	Meal Type	Meal Pattern
<input checked="" type="checkbox"/>	Hamburger Meal	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014

Back Next

Menu Calendar Select Menu/Menu Cycle Review & Confirm

Back

Selected Date: 9/2/2013
Menu: Hamburger Meal

Menu Item
Category: Meals; Choose: 1 Hamburger w/ Bun
Category: Salads; Choose: 1 Hamburger
Category: Fruit; Choose: 1 Apple, Golden Delicious Banana
Category: Milk; Choose: 1 Fat-free Milk Low-Fat Milk

Site Name	Site Group	Effective Date	End Date
EMERSON ELEMENTARY SCHOOL	Elementary School	10/20/2012	

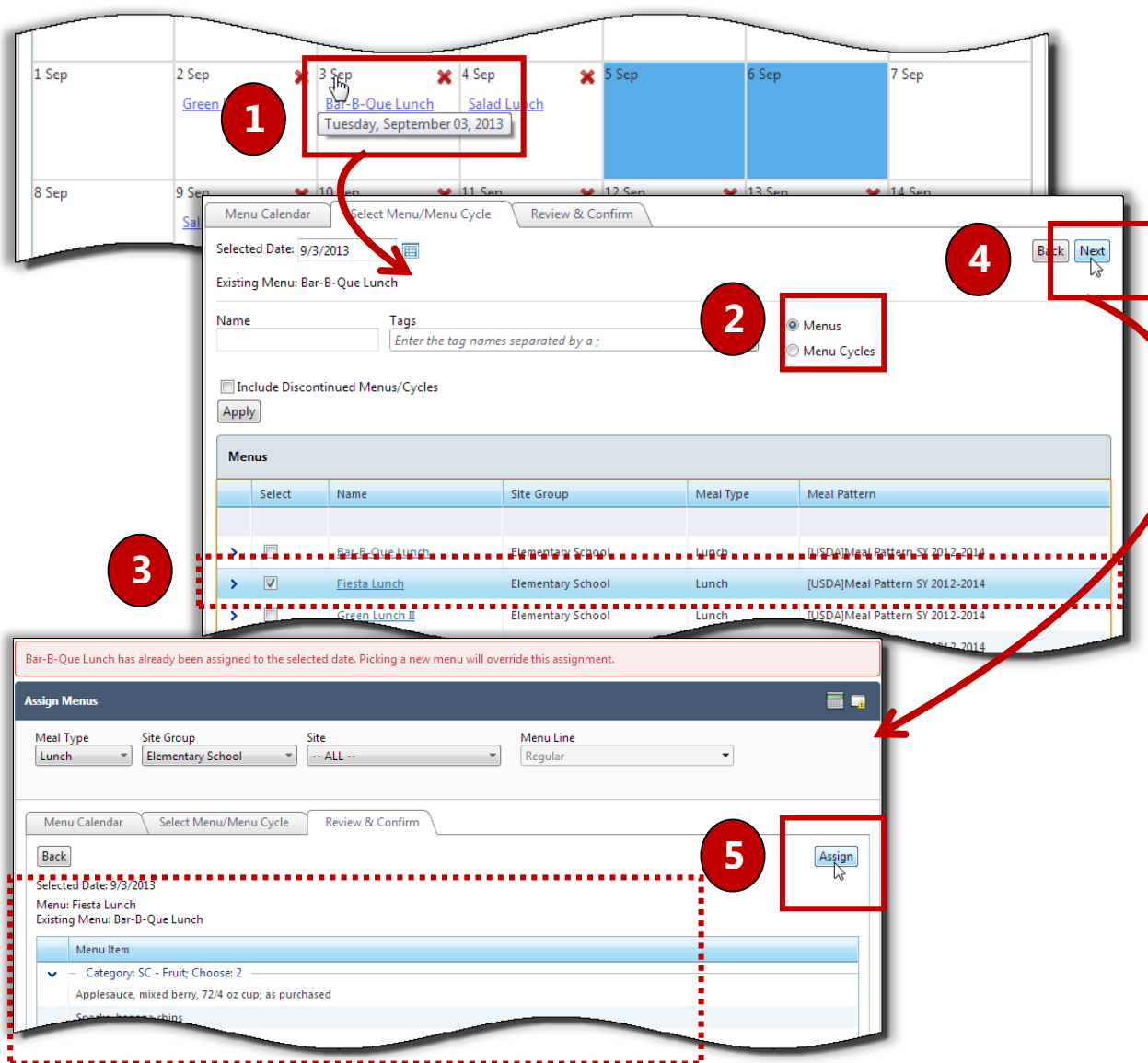
Back Assign

Replacing an Assigned Menu

Occasionally you will need to replace a menu that is currently assigned to the Menu Calendar to take advantage of new product offerings, meet new menu requirements from the USDA, or simply just to offer something new to keep your patrons interested.

To replace an assigned Menu

1. Display a menu calendar and click on the calendar date.
2. Click **Menus**.
3. Select a Menu.
4. Click **Next**.
5. Review the Serving Dates on which the menus will be assigned and click **Assign**.



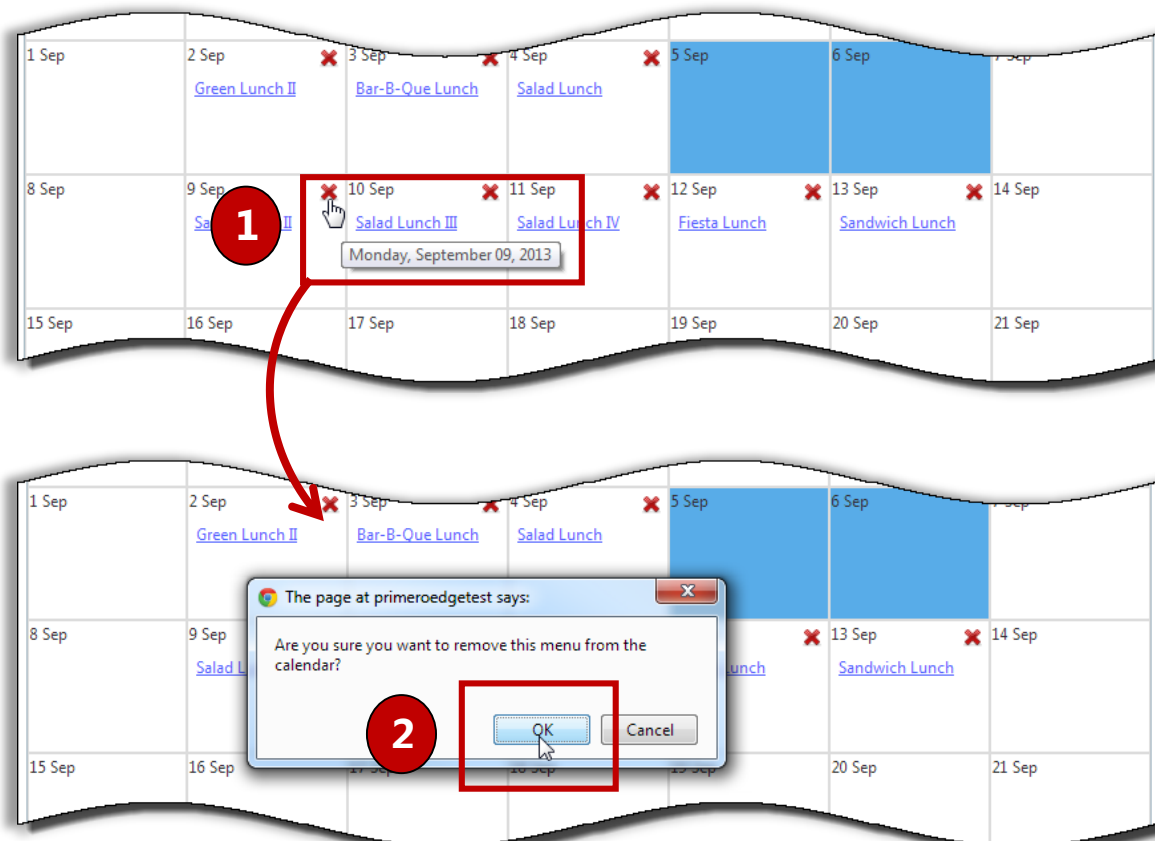
Removing an Assigned Menu

Occasionally, you will need to remove a Menu from the Menu Calendar, such as when a special event that doesn't require meal service is scheduled after the Menu Calendar has been assigned menus.

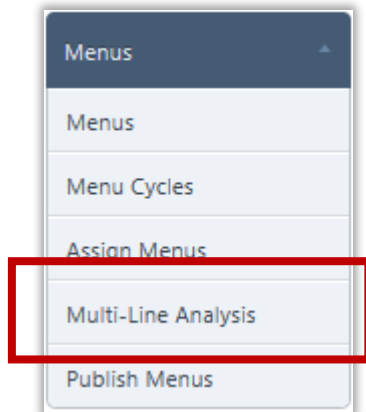
To remove an assigned Menu

1. Display a Menu Calendar and click **Delete** () on the calendar day with the Menu to be removed.

2. Click  .



Multi-Line Analysis



In some feeding sites, multiple Production records are used/required for a single Meal Service when multiple Menu Lines are offered, such as a Lunch Meal Service that offers a Pizza Line, a Sandwich Line, a Salad Line, etc.

A patron may cross Menu Lines and make choices from more than one Menu Line. Therefore some feeding sites are required to verify that USDA *weekly* guidelines are met when patrons have the opportunity to make choices from multiple Menu Lines. Multi-Line Analysis performs that analysis with selected Menu Cycles.


Multi-Line Analysis Page

 The 'Multi-Line Analysis' page interface. At the top, there are three dropdown menus: 'Meal Pattern' (set to '-- SELECT --'), 'Meal Type' (set to '-- SELECT --'), and 'Site Group' (set to '-- SELECT --'). Below these are 'Days in Week' (set to '5') and 'Menu Cycle Name' (a blank text field). There is a checkbox for 'Include Discontinued Menu Cycles' and an 'Apply' button. The page contains two tables. The first table, 'Menu Cycles Available', has columns 'Name' and 'Week to Add' and shows 'No records to display.' The second table, 'Menu Cycles Added to Analysis', has columns 'Name', 'Week Selected', and 'Delete' and also shows 'No records to display.'

By default on the **Multi-Line Analysis** page:



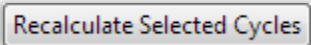
- **Days in Week** is set to “5” (five)
- All other criteria are set to “SELECT” or are blank.

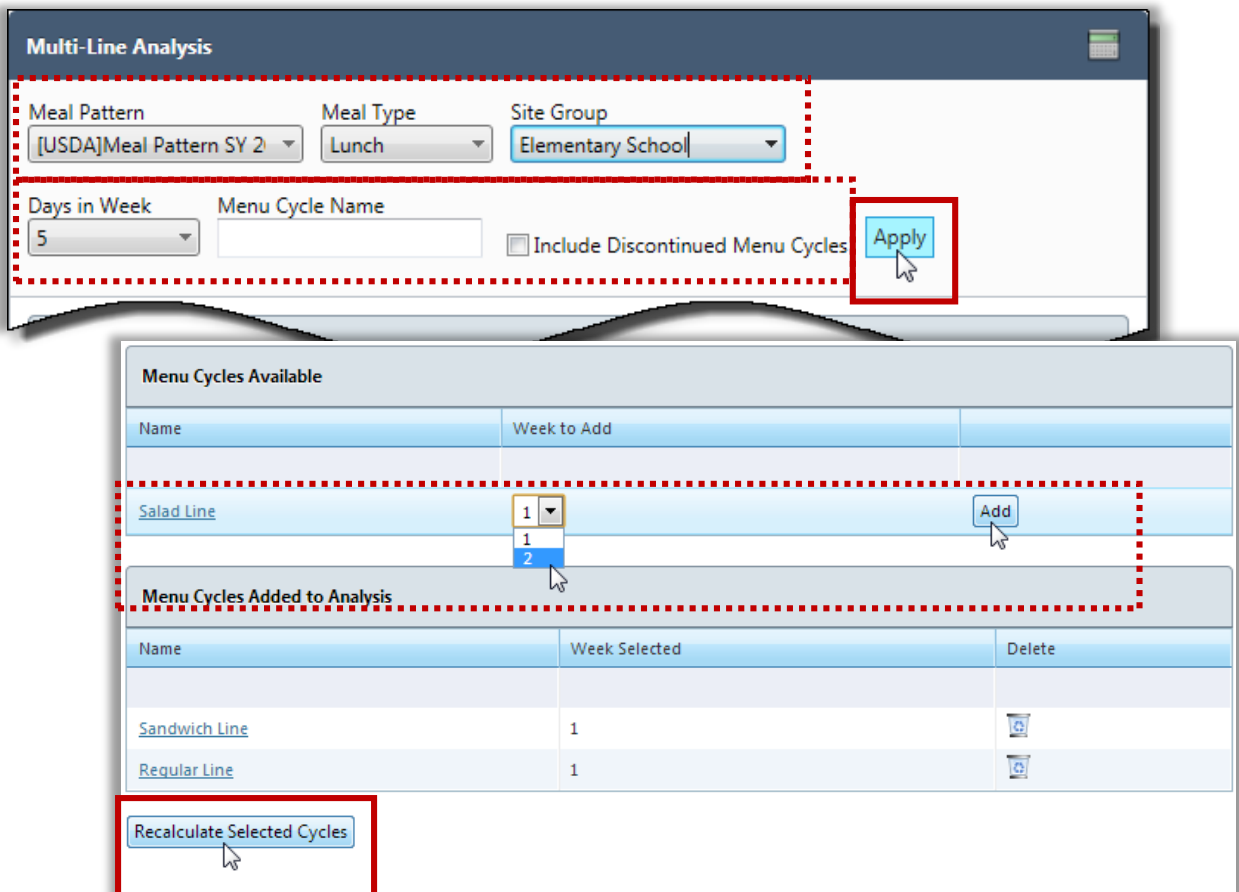
Page Functions

Button/Link	Description
	Click to display all Menu Cycles in the Available Menu Cycles list that match the selected search conditions.

Generating a Multi-Line Analysis

To perform a Multi-Line analysis

1. Select **Meal Pattern**, **Meal Type**, and **Site Group**.
2. Change the **Days in Week**, enter a **Menu Cycle Name**, and select **Include Discontinued Menu Cycles**, if needed.
3. Click .
4. Click  in each Menu Cycle listing to include in the analysis; select Menu Cycle weeks, if needed.
5. Click .




The screenshot displays the 'Multi-Line Analysis' window. At the top, there are search filters: 'Meal Pattern' (set to '[USDA]Meal Pattern SY 2'), 'Meal Type' (set to 'Lunch'), and 'Site Group' (set to 'Elementary School'). Below these are 'Days in Week' (set to '5'), 'Menu Cycle Name' (empty), and a checkbox for 'Include Discontinued Menu Cycles'. An 'Apply' button is highlighted with a red box. Below the filters, there are two tables. The first table, 'Menu Cycles Available', has columns 'Name' and 'Week to Add'. It lists 'Salad Line' with a dropdown menu showing options 1, 2, and 3. An 'Add' button is next to it. The second table, 'Menu Cycles Added to Analysis', has columns 'Name', 'Week Selected', and 'Delete'. It lists 'Sandwich Line' and 'Regular Line', both with 'Week Selected' set to 1. A 'Recalculate Selected Cycles' button is highlighted with a red box at the bottom.

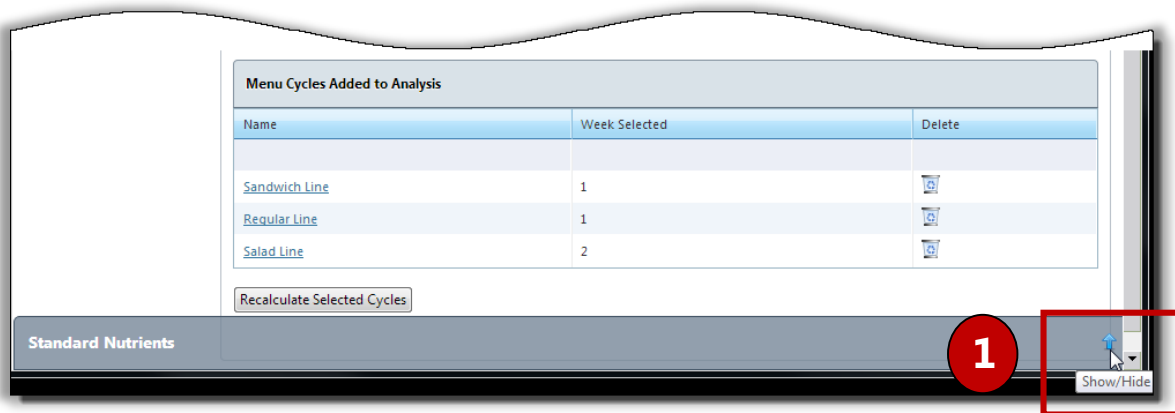
Viewing Nutrients and Food Components for a Multi-Line Analysis

The Multi-Line Analysis display includes a Standard Nutrients footer. This footer provides one tab of nutrition information for each serving group.

- Nutrient values that fall *below* the requirements for a food component are highlighted in **yellow**.
- Nutrient values that fall *above* the maximum nutritional requirements are highlighted in **red**.
- Fail** message in the **Milk-V** column indicates that the requirement for providing at least two choices (a “variety” of milks) in a meal service has not been met.

To view Standard Nutrients for a Serving Group

- Click **Show/Hide Standard Nutrients Footer** ().
- Click a tab to view nutrients for a different serving group.




Standard Nutrients Week 1 - Elementary Schools 1 Add Low High

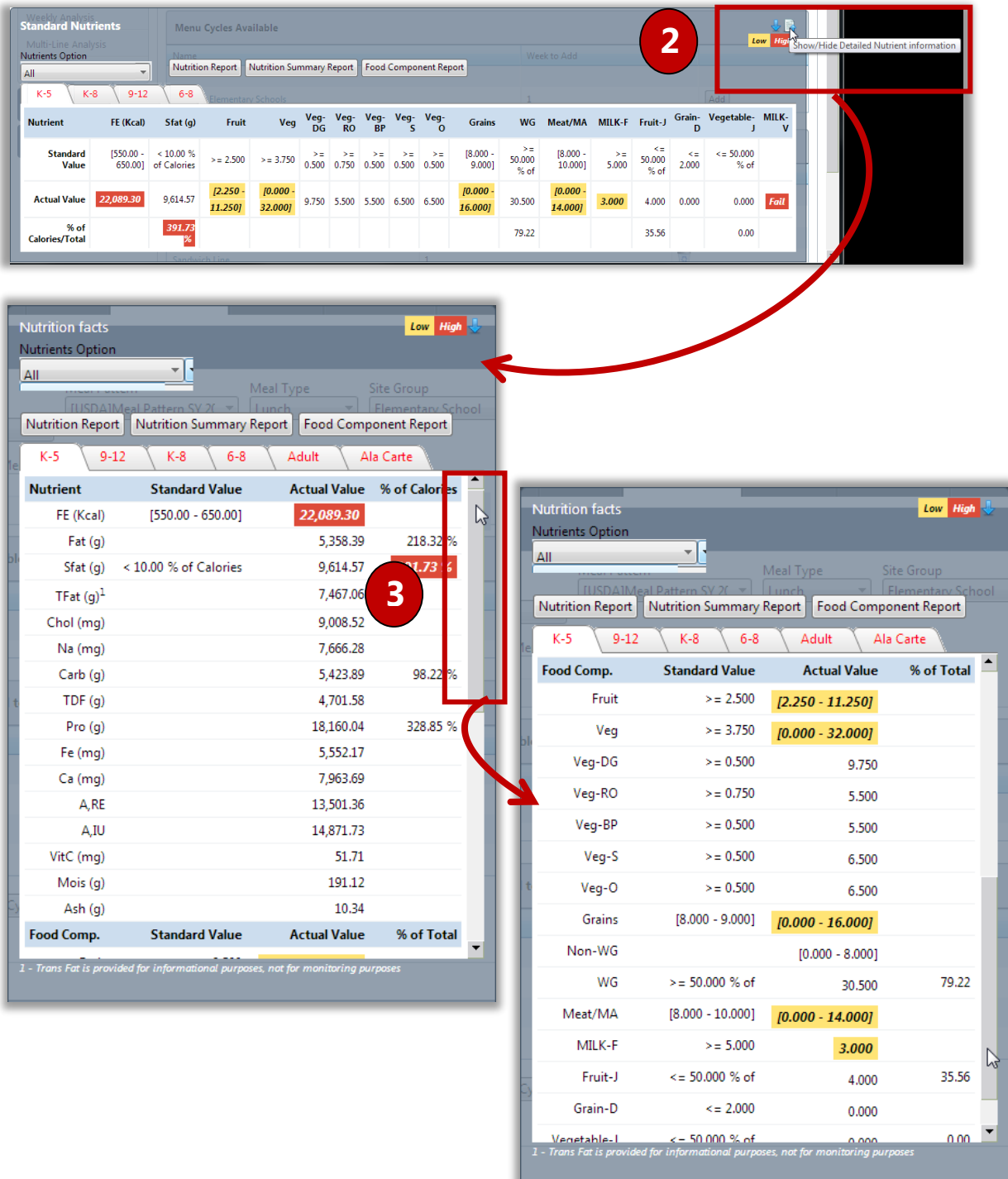
Nutrients Option: All Nutrition Report Nutrition Summary Report Food Component Report

K-5 K-8 9-12 6-8 Week Selected Delete

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
Standard Value	[550.00 - 650.00]	< 10.00 % of Calories	>= 2.500	>= 3.750	>= 0.500	>= 0.750	>= 0.500	>= 0.500	>= 0.500	[8.000 - 9.000]	>= 50.000 % of	[8.000 - 10.000]	>= 5.000	<= 50.000 % of	<= 2.000	<= 50.000 % of	
Actual Value	22,089.30	9,614.57	[2.250]	[0.000]	9.750	5.500	5.500	6.500	6.500	[0.000]	30.500	[0.000 - 14.000]	3.000	4.000	0.000	0.000	Fail
% of Calories/Total		391.73 %									79.22			35.56		0.00	

To view Standard Nutrients details for a Serving Group

1. Display a menu and click a tab to view nutrients for a serving group.
2. Click **Show/Hide Detailed Nutrient Information** ().
3. Scroll to view Food Component details.



The screenshot illustrates the steps to view detailed nutrient information for a serving group. It shows the 'Standard Nutrients' report for 'Elementary Schools' with the 'Food Component Report' tab selected. A red box labeled '1' highlights the 'Nutrient' column. A red box labeled '2' highlights the 'Show/Hide Detailed Nutrient Information' button. A red box labeled '3' highlights the 'Actual Value' column in the 'Food Component Report' table.

Standard Nutrients Report Data (Food Component Report):

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
Standard Value	[550.00 - 650.00]	< 10.00 % of Calories	>= 2.500	>= 3.750	>= 0.500	>= 0.750	>= 0.500	>= 0.500	>= 0.500	[8.000 - 9.000]	>= 50.000 % of	[8.000 - 10.000]	>= 5.000	<= 50.000 % of	<= 2.000	<= 50.000 % of	
Actual Value	22,089.30	9,614.57	[2.250 - 11.250]	[0.000 - 32.000]	9.750	5.500	5.500	6.500	6.500	[0.000 - 16.000]	30.500	[0.000 - 14.000]	3.000	4.000	0.000	0.000	Fail
% of Calories/Total		391.73 %									79.22			35.56		0.00	

Nutrition facts (Food Component Report):

Food Comp.	Standard Value	Actual Value	% of Total
Fruit	>= 2.500	[2.250 - 11.250]	
Veg	>= 3.750	[0.000 - 32.000]	
Veg-DG	>= 0.500	9.750	
Veg-RO	>= 0.750	5.500	
Veg-BP	>= 0.500	5.500	
Veg-S	>= 0.500	6.500	
Veg-O	>= 0.500	6.500	
Grains	[8.000 - 9.000]	[0.000 - 16.000]	
Non-WG		[0.000 - 8.000]	
WG	>= 50.000 % of	30.500	79.22
Meat/MA	[8.000 - 10.000]	[0.000 - 14.000]	
MILK-F	>= 5.000	3.000	
Fruit-J	<= 50.000 % of	4.000	35.56
Grain-D	<= 2.000	0.000	
Vegetable-J	<= 50.000 % of	0.000	0.00

Generating a Nutrient Analysis Report with a Multi-Line Analysis

The Menu Nutrient Analysis Report displays either detailed nutrition information for all nutrients or “simplified” information that includes:

Calories Saturated Fat Calcium

The default selection is “All” which is set through the [Default Nutrients Option](#) system setting.

Highlighted report values include

- Nutrient values that fall *below* the requirements for a food component are highlighted in **yellow**.
- Nutrient values that fall *above* the maximum nutritional requirements are highlighted in **red**.
- **Fail** message in the **Milk-V** column indicates that the requirement for providing at least two choices (a “variety” of milks) in each meal service has not been met.

To view Standard Nutrient details for a Serving Group

1. Display the Standard Nutrients footer for a menu and select a serving group.
2. Select a Nutrient Option.
3. Click **Nutrition Report**.

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
Standard Value	[550.00 - 650.00]	< 10.00 % of Calories	>= 2,500	>= 3,750	>= 0.500	>= 0.750	>= 0.500	>= 0.500	>= 0.500	[8,000 - 9,000]	>= 50,000 % of	[8,000 - 10,000]	>= 5,000	<= 50,000 % of	<= 2,000	<= 50,000 % of	
Actual Value	22,089.30	9,614.57	[2,250 - 11,250]	[0,000 - 32,000]	9,750	5,500	5,500	6,500	6,500	[0,000 - 16,000]	30,500	[0,000 - 14,000]	3,000	4,000	0,000	0,000	Fail
% of Calories/Total		391.73 %									79.22			35.56		0.00	

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
Standard Value	[750.00 - 850.00]	< 10.00 % of Calories	>= 5,000	>= 5,000	>= 0.500	>= 1,250	>= 0.500	>= 0.500	>= 0.750	[10,000 - 12,000]	>= 50,000 % of	[10,000 - 12,000]	>= 5,000	<= 50,000 % of	<= 2,000	<= 50,000 % of	
Actual Value	128,552.14	57,602.95	[1,000 - 3,000]	[15,000 - 19,500]	7,500	3,000	3,000	3,000	3,000	4,000	2,000	[1,000 - 4,500]	1,000	0,000	0,000	0,000	Fail
% of Calories/Total		403.28 %									50.00			0.00		0.00	

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Menu Cycle Week Nutrient Analysis Report

Menu Cycle Name - Regular Line - Week 1, Salad Line - Week 2, Sandwich Line - Week 1
 Site Group - Middle School Meal Pattern - [USDA]Meal Pattern SY 2012-2014
 Serving Group - K-8 Calculation Method - Weighted Analysis
 Meal Type - Lunch Result - **Fail**

Simplified Nutrients Option

Cycle Week Nutrient Summary				Cycle Week Food Component Summary			
Nutrient	Weekly Standard Value	Actual Value	% of Calories	Food Component	Standard Value	Actual Value	% of Total
FE (Kcal)	[600.00 - 650.00]	128,115.63		Fruit	>= 2,500	[2,000 - 4,500]	
Sfat (g)	< 10.00 % of Calories	57,601.52	404.65	Veg	>= 3,750	[0,000 - 6,500]	
Na (mg)		41,152.86		Veg-DG	>= 0,500	5,500	
				Veg-RO	>= 0,750	0,500	
				Veg-BP	>= 0,500	0,500	
				Veg-S	>= 0,500	0,000	
				Veg-O	>= 0,500	0,000	
				Grains	[8,000 - 9,000]	0,000	
				Non-WG		0,000	
				WG	>= 50,000 % of	0,000	
				Meat/MA	[9,000 - 10,000]	[1,000 - 5,500]	
				MILK-F	>= 5,000	1,000	
				Fruit-J	<= 50,000 % of	0,000	0.00
				Grain-D	<= 2,000	0,000	
				Vegetable-J	<= 30,000 % of	0,000	0.00
				MILK-V		Fail	

Legend
(M) - Missing Nutrient Values

Item Name (Serving Size)	Plan Qty	FE (Kcal)	Sfat (g)	Na (mg)
Green Lunch II - Day: 1	100			
Category: SC - Fruit; Choose: 2				
Applesauce, mixed berry, 72/4 oz cup; as purchased - LR300063 (4 oz.)	0	89.99	-M-	
Strawberries, raw - LR300062 (1 CN-CUP, ha)	0	48.64	0.02	
Category: SC - Milk; Choose: 1				

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Menu Cycle Week Nutrient Analysis Report

Menu Cycle Name - Regular Line - Week 1, Salad Line - Week 2, Sandwich Line - Week 1
 Site Group - Middle School Meal Pattern - [USDA]Meal Pattern SY 2012-2014
 Serving Group - K-8 Calculation Method - Weighted Analysis
 Meal Type - Lunch Result - **Fail**

"All" Nutrients Option

Cycle Week Nutrient Summary				Cycle Week Food Component Summary			
Nutrient	Weekly Standard Value	Actual Value	% of Calories	Food Component	Standard Value	Actual Value	% of Total
FE (Kcal)	[600.00 - 650.00]	128,115.63		Fruit	>= 2,500	[2,000 - 4,500]	
Fat (g)		32,003.07	224.82	Veg	>= 3,750	[0,000 - 6,500]	
Sfat (g)	< 10.00 % of Calories	57,601.52	404.65	Veg-DG	>= 0,500	5,500	
TFat (g)(1)		44,800.03		Veg-RO	>= 0,750	0,500	
Chol (mg)		53,765.11		Veg-BP	>= 0,500	0,500	
Na (mg)		41,152.86		Veg-S	>= 0,500	0,000	
Cerb (g)		32,015.87	99.96	Veg-O	>= 0,500	0,000	
TDF (g)		28,161.88		Grains	[8,000 - 9,000]	0,000	
		108,803.15	339.70	Non-WG		0,000	
		33,283.76		WG	>= 50,000 % of	0,000	
		46,176.43		Meat/MA	[9,000 - 10,000]	[1,000 - 5,500]	
A.RE		79,489.16		MILK-F	>= 5,000	1,000	
A.IU		81,291.98		Fruit-J	<= 50,000 % of	0,000	0.00
ViC (mg)		8.70		Grain-D	<= 2,000	0,000	
Mois (g)		5.66		Vegetable-J	<= 30,000 % of	0,000	0.00
Ash (g)		2.31		MILK-V		Fail	

Legend
(M) - Missing Nutrient Values
1 Trans Fat is provided for informational purposes, not for monitoring purposes

Item Name (Serving Size)	Plan Qty	FE (Kcal)	Fat (g)	Sfat (g)	TFat (g)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)	Pro (g)	Fe (mg)	Ca (mg)	A.RE	A.IU	ViC (mg)	Mois (g)	Ash (g)
Green Lunch II - Day: 1	100																	
Category: SC - Fruit; Choose: 2																		
Applesauce, mixed berry, 72/4 oz cup; as purchased - LR300063 (4 oz.)	0	89.99	-M-	-M-	-M-	-M-	-M-	21.99	0.99	-M-	-M-	-M-	20.00	-M-	-M-	1.20	89.99	0.60
Strawberries, raw - LR300062 (1 CN-CUP, ha)	0	48.64	0.46	0.02	-M-	-M-	1.52	11.67	3.04	-M-	1.02	0.62	24.32	4.56	18.24	89.98	138.24	0.61

Page: 1 of 2

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Menu Cycle Week Nutrient Analysis Report

COUNTY

Menu Cycle Name - Regular Line - Week 1, Sandwich Line - Week 1, Salad Line - Week 2

Site Group - Middle School Meal Pattern - [USDA]Meal Pattern SY 2012-2014

Serving Group - K-5 Calculation Method - Weighted Analysis

Meal Type - Lunch Result - **Fail**

Cycle Week Nutrient Summary				Cycle Week Food Component Summary			
Nutrient	Weekly Standard Value	Actual Value	% of Calories	Food Component	Standard Value	Actual Value	% of Total
FE (Kcal)	[550.00 - 650.00]	69,021.99		Fruit	>= 2.500	[2.250 - 12.250]	
Fat (g)		17,091.71	222.86	Veg	>= 3.750	[0.000 - 32.000]	
Sfat (g)	< 10.00 % of Calories	30,734.57	400.76	Veg-DG	>= 0.500	9.750	
Na (mg)		22,684.61		Veg-RO	>= 0.750	5.500	
Carb (g)		17,157.20	99.43	Veg-BP	>= 0.500	5.500	
Pro (g)		58,053.35	336.43	Veg-S	>= 0.500	6.500	
				Veg-O	>= 0.500	6.500	
				Grains	[8.000 - 9.000]	[0.000 - 16.000]	
				Non-WG		[0.000 - 8.000]	
				WG	>= 50.000 % of	31.500	79.75
				Meat/MA	[8.000 - 10.000]	[0.000 - 14.000]	
				MILK-F	>= 5.000	3.000	
				Fruit-J	<= 50.000 % of	4.000	32.65
				Grain-D	<= 2.000	0.000	
				Vegetable-J	<= 50.000 % of	0.000	0.00
				MILK-V		Fail	

Legend
(M) - Missing Nutrient Values

Item Name (Serving Size)	Plan Qty	FE (Kcal)	Fat (g)	Sfat (g)	Na (mg)	Carb (g)	Pro (g)
Copy1 of 11 th Demo menu2 - Day: 1	5						
Category: WOOD -Meals; Choose: 1							
3.6 oz Precooked Breaded Fish Portions - LR100210 (3 5/8 oz.)	0	193.80	8.16	0.51	316.20	17.34	14.28
Artesian Water - LR100100 (1)	0	-M-	-M-	-M-	-M-	-M-	-M-
PC-Dual entry form of curry pu - LR100195 (3 ea.)	0	236.13	5.70	1.07	288.06	10.83	4.51

Page: 1 of 6

"Expanded" Nutrients Option

Generating a Nutrition Summary Report with a Multi-Line Analysis

The Menu Cycle Week Nutrient Summary Report displays the daily totals, the average daily value (Actual Value), and the percentage of total weekly calories for each nutrient.

- Weekly calorie values that fall *outside* (above or below) the weekly requirements are shown in **red** in **Actual Value**.
- Saturated Fat values that fall *below* the weekly requirements are shown in **green** in **Actual Value** and **% of Calories**.

To view the Menu Cycle Week Nutrient Summary Report for a Serving Group

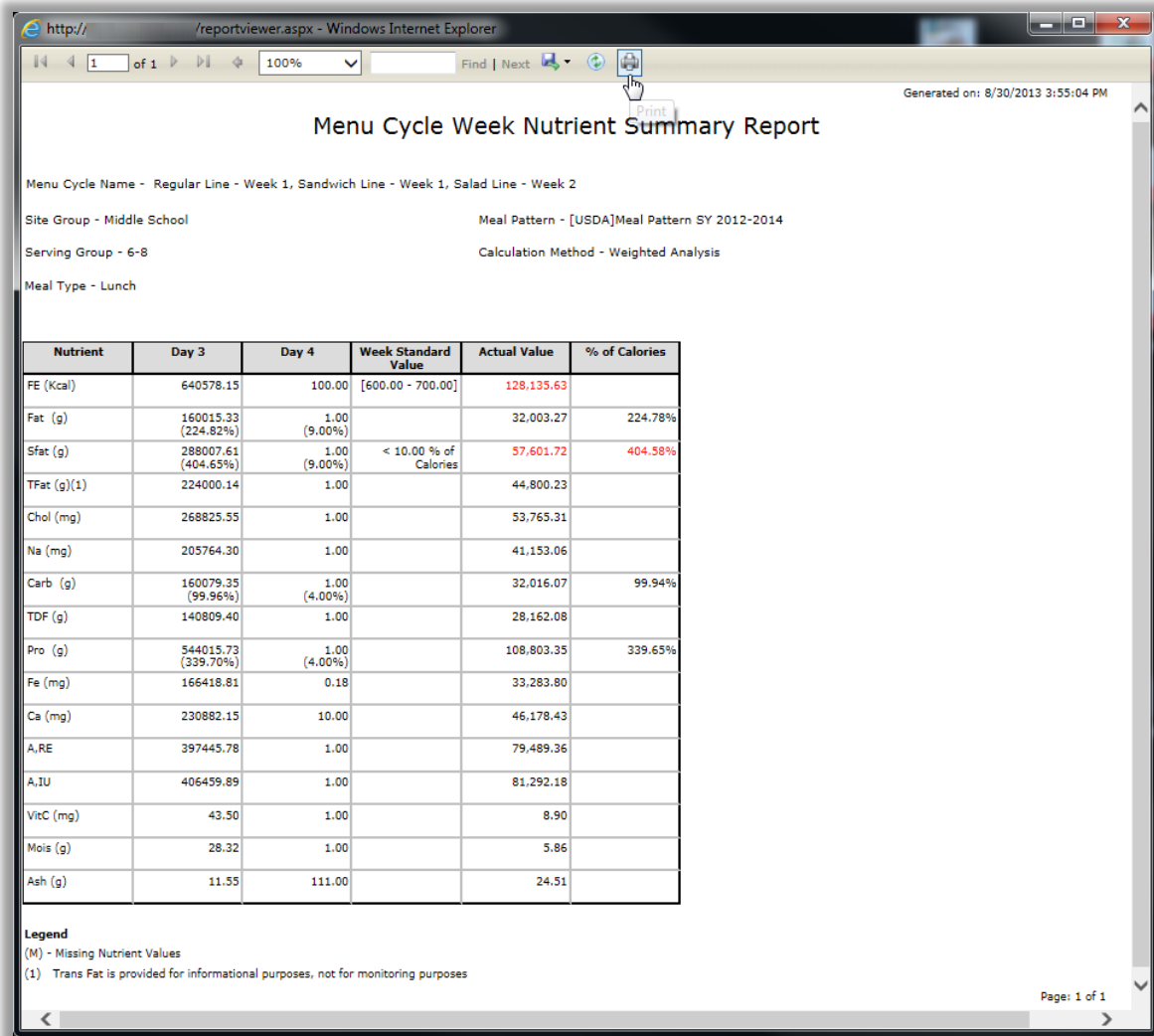
- Display the Standard Nutrients footer for a multi-line analysis and select a Serving Group, if needed.
- Click **Nutrition Summary Report**.

The first screenshot shows the 'Standard Nutrients' report for the '6-8' serving group. The 'Nutrition Summary Report' button is highlighted with a red circle and arrow. The table below shows the data for this report.

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
Standard Value	[550.00 - 650.00]	< 10.0 % of Calories	>= 2,500	>= 3,750	>= 0.500	>= 0.750	>= 0.500	>= 0.500	>= 0.500	[8,000 - 9,000]	>= 50,000 % of	[8,000 - 10,000]	>= 5,000	<= 50,000 % of	<= 2,000	<= 50,000 % of	
Actual Value	22,089.30	614.57	[2,250 - 11,250]	[0,000 - 32,000]	9,750	5,500	5,500	6,500	6,500	[0,000 - 16,000]	30,500	[0,000 - 14,000]	3,000	4,000	0,000	0,000	Fail
% of Calories/Total		391.73 %									79.22			35.56		0.00	

The second screenshot shows the 'Standard Nutrients' report for the '6-8' serving group. The 'Nutrition Summary Report' button is highlighted with a red circle and arrow. The table below shows the data for this report.

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
Standard Value	[600.00 - 700.00]	< 10.00 % of Calories	>= 2,500	>= 3,750	>= 0.500	>= 0.750	>= 0.500	>= 0.500	>= 0.500	[8,000 - 10,000]	>= 50,000 % of	[9,000 - 10,000]	>= 5,000	<= 50,000 % of	<= 2,000	<= 50,000 % of	
Actual Value	128,135.63	57,601.72	[1,000 - 3,000]	[15,000 - 19,500]	7,500	3,000	3,000	3,000	3,000	4,000	2,000	[1,000 - 4,500]	1,000	0,000	0,000	0,000	Fail
% of Calories/Total		404.58 %									50.00			0.00		0.00	



Generating a Weekly Food Component Report with a Multi-Line Analysis

The Weekly Food Component Report displays daily values and weekly totals for each required food component along with a Pass / Fail weekly check for component requirements. Details of component sub-categories appear below the component summary information, such as Dark Green, Red/Orange, etc., for the Vegetables component.

Highlighted report values include

- Nutrient values that fall *below* the requirements for a food component are highlighted in **yellow**.
- Nutrient values that fall *above* the maximum nutritional requirements are highlighted in **red**.
- **Fail** message in the **Milk-V** column indicates that the requirement for providing at least two choices (a “variety” of milks) in each meal service has not been met.

To view Standard Nutrient details for a Serving Group

1. Display the Standard Nutrients footer for a menu and select a serving group.
2. Click **Food Component Report**.

Standard Nutrients Week 1 - Elementary Schools 1

Nutrients Option: All

Report Type: Nutrition Report, Nutrition Summary Report, **Food Component Report**

Week Selected: 1

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
Standard Value	[550.00 - 650.00]	< 10.00 % of Calories	>= 2.500	>= 3.750	>= 0.500	>= 0.750	>= 0.500	>= 0.500	>= 0.500	[8.000 - 9.000]	>= 50.000 % of	[8.000 - 10.000]	>= 5.000	<= 50.000 % of	<= 2.000	<= 50.000 % of	
Actual Value	22,089.30	9,614.57	[2.250]	[0.000]	9.750	5.500	5.500	6.500	6.500	[0.000]	30.500	[0.000 - 14.000]	3.000	4.000	0.000	0.000	Fail
% of Calories/Total		391.73 %								16.000	79.22			35.56		0.00	

Standard Nutrients Week 1 - Elementary Schools 1

Nutrients Option: All

Report Type: Nutrition Report, Nutrition Summary Report, **Food Component Report**

Week Selected: 1

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
Standard Value	[750.00 - 850.00]	< 10.00 % of Calories	>= 5.000	>= 5.000	>= 0.500	>= 1.250	>= 0.500	>= 0.500	>= 0.750	[10.000 - 12.000]	>= 50.000 % of	[10.000 - 12.000]	>= 5.000	<= 50.000 % of	<= 2.000	<= 50.000 % of	
Actual Value	128,552.14	57,602.95	[1.000]	[15.000]	7.500	3.000	3.000	3.000	3.000	4.000	2.000	[1.000 - 4.500]	1.000	0.000	0.000	0.000	Fail
% of Calories/Total		403.28 %									50.00			0.00		0.00	

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Weekly Food Component Report

... COUNTY

Menu Cycle Name - Regular Line - Week 1, Sandwich Line - Week 1, Salad Line - Week 2

Site Group - Elementary School Meal Pattern - [USDA]Meal Pattern SY 2012-2014

Serving Group - K-5 Meal Type - Lunch

Fruit (cups)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Minimum Fruits (cups)	[0.000 - 2.500] (Fail)	[0.000 - 2.500] (Fail)	[0.000 - 2.500] (Fail)	[1.000 - 1.750] (Pass)	[1.250 - 3.000] (Pass)	[2.250 - 12.250]	≥ 2.500	Fail

Weekly Fruit Juice Limit Requirement	Total Weekly Fruit	Total Weekly Fruit Juice	Percent of Total Weekly Fruit that is Juice	Weekly Requirement Check
≤ 50.000 % of	12.250	4.000	32.653%	Pass

Vegetables (cups)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Vegetables (cups)	[0.000 - 10.000] (Fail)	0.000 (Fail)	[0.000 - 4.500] (Fail)	[0.000 - 15.000] (Fail)	[0.000 - 2.500] (Fail)	[0.000 - 32.000]	≥ 3.750	Fail
Dark Green	2.000	0.000	4.500	3.000	0.250	9.750	≥ 0.500	Pass
Red/Orange	2.000	0.000	0.250	3.000	0.250	5.500	≥ 0.750	Pass
Beans/Peas (Legumes)	2.000	0.000	0.000	3.000	0.500	5.500	≥ 0.500	Pass
Starchy	2.000	0.000	0.500	3.000	1.000	6.500	≥ 0.500	Pass
Other	2.000	0.000	0.250	3.000	1.250	6.500	≥ 0.500	Pass

Weekly Vegetable Juice Limit Requirement	Total Weekly Vegetables	Total Weekly Vegetable Juice	Percent of Total Weekly Vegetables that is Juice	Weekly Requirement Check
≤ 50.000 % of	32.000	0.000	0.000%	Pass

Meat / Meat Alternate (oz eq.)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Meat/Meat Alternates (oz eq.)	[0.000 - 4.000] (Fail)	[0.000 - 2.500] (Fail)	[0.000 - 3.500] (Fail)	[0.000 - 2.000] (Fail)	[0.000 - 2.000] (Fail)	[0.000 - 14.000]	[8.000 - 10.000]	Fail

Grains (oz eq.)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Grains (oz eq.)	[0.000 - 6.000] (Fail)	[0.000 - 2.000] (Fail)	[0.000 - 2.000] (Fail)	[0.000 - 4.000] (Fail)	[0.000 - 2.000] (Fail)	[0.000 - 16.000]	[8.000 - 9.000]	Fail

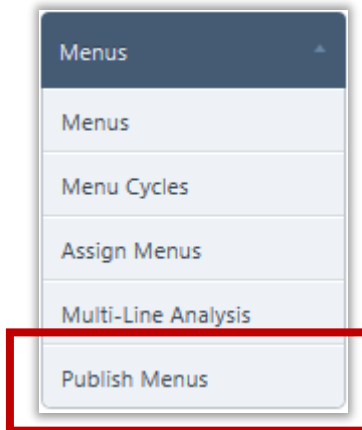
Weekly Whole Grain Rich	Weekly Grains Total	Weekly Whole Grain Rich Total	Percent of Whole Grain Rich	At Least Half Whole Grain Rich	Grain Based Dessert Total for All Weekly Meals	No More Than 2oz eq. of Grain Based Desserts
≥ 50.000 % of	39.500	31.500	79.747%	Pass	0.000	Pass

Milk (cups)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Minimum Fluid Milk (cups)	1.000 (Pass)	0.000 (Fail)	0.000 (Fail)	1.000 (Pass)	1.000 (Pass)	3.000	≥ 5.000	Fail

*USDA is offering flexibility for SY 2012-2013 and SY 2013-2014 by allowing SFAs to exceed the maximum amount of grains and meat/meat meal alternates as long as the daily and weekly minimums for these components are met and the calories are within the required range. If you exceed the weekly maximum for grain and/or meat/meat alternates, your report will say that you fail for those categories, but that is acceptable at this time.

Page: 1 of 1

Publish Menu



Publish Menu allows the Menu Planner to place one or more days of assigned menus on the Parent Online web site. This in turn allows parents to view menus scheduled for their child's school.

Limited menu details are provided after menu retrieval and before copying the menus to Parent Online.

By default, existing Menus for the selected date(s) are overwritten.


Publish Menu Page

 The 'Publish Menu' form has a dark blue header with the title 'Publish Menu' and a small icon. Below the header, there are three input fields: 'Start Date' with the value '7/18/2013' and a calendar icon, 'Number of Days' with the value '31', and a checkbox labeled 'Override Existing Menu' which is checked. At the bottom left of the form is a 'Get Menu' button.

By default on the **Publish Menu** page:

- **Start Date** is set to the current date.
- **Number of Days** is set to “31” (thirty one).
- **Override Existing Menu** is selected and unavailable.

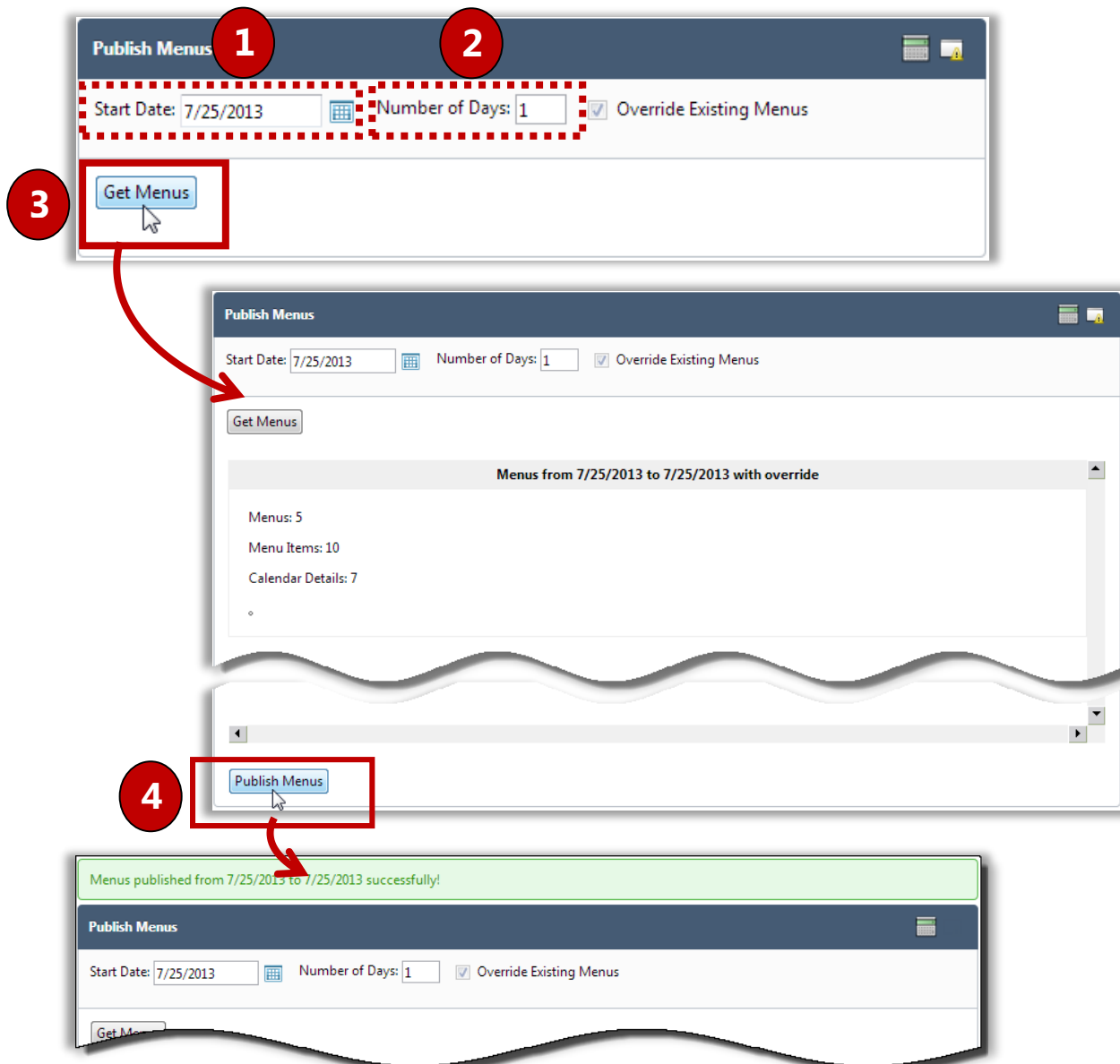
Page Functions

Button/Link	Description
	Click to display all recipe records in the Recipe List that match the set search conditions.

Publishing Menus to Parent Online

To publish Menus to Parent Online

1. Enter or select the first date of menus to publish in **Start Date**.
2. Enter the total **Number of Days** to publish.
3. Click **Get Menu** .
4. Click **Publish Menu** .



◀ End of Section ▶

4

Reports

In this chapter you will learn:

- ✓ Generate a report of menu items served for a selected month.
- ✓ Generate a report of menu item nutrients served for a selected month.
- ✓ Generate a report listing nutrient information for a selected set of ingredients.
- ✓ Generate a report listing nutrient information for a single serving of a recipe.
- ✓ Generate a report listing nutrient information for selected nutrients for a Serving Group.
- ✓ Generate a report listing current nutrient standards for each serving group in a selected Meal Pattern.
- ✓ Generate a report of all planned counts for menu items.

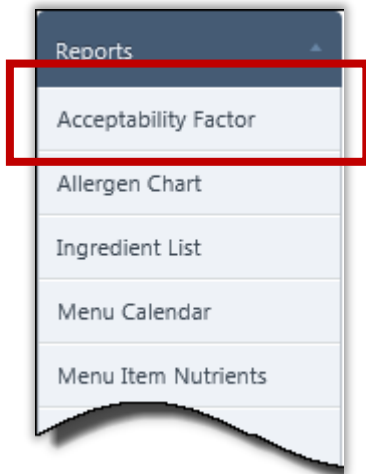
Reports at a Glance

Menu Function	Description
Acceptability Factor	Generates a report of all planned counts for menu items.
Allergen Chart	Displays a list of all allergens found in all Menu Items included on Menus for a selected date range.
Ingredient List	Generates a report of nutrients for a selected set of ingredients identified by tags, data source, and either “As Purchased” or “As Served”.
Menu Calendar	Generates one of two reports: <ul style="list-style-type: none"> Menu Calendar – report of menu items served for a selected month Menu Calendar – report of nutrients of menu items served for a selected month
Menu Item Nutrients	Generates a report of selected nutrients for a selected data source, Meal Pattern and Serving Group.
Nutrient Standards	Generates a report of all current nutrient standards or requirements for each Serving Group in a selected Meal Pattern.
Recipe Book	Prints all recipes for a selected data source; recipes are ordered by recipe code; each recipe starts on a new page and provides detailed nutrient information.
Recipe Costing Report	Generates a report of all recipes for the district and provides serving size, number of servings, and cost per serving dollar number.
Recipe Nutrition	Generates a report of nutrient information for one (1) serving and 100 gm of a selected recipe.
Weekly Nutrient Analysis	Generates the Standard Nutrient footer for a Menu or Menu Cycle; nutrient values and food component counts can be viewed; Nutrient Analysis Report can be generated for a Menu or Menu Cycle; Food Component Report can be generated for a Menu Cycle.

Note

Menus and functions to which you have access are those appropriate for your role with PrimeroEdge. When you access the **Reports** menu, you may see a subset of the functions listed above.

Acceptability Factor



Acceptability Factor provides aggregate information on planned counts for all menu items to assist the nutritionist in setting weighted counts.

This report lists all menu items served for a selected date range. Planned counts, Meal counts, Serving Size and Menu Item Category are listed for each menu item.

The report can be printed or exported to one of seven formats: XML, CVS, PDF, MHTL, TIFF, Excel or Word.

Acceptability Factor Page

A screenshot of the 'Acceptability Factor' report generation page. The page has a dark blue header with the title 'Acceptability Factor' and icons for a calendar and a warning. Below the header, there are two date input fields: 'Start Date' with the value '6/18/2013' and 'End Date' with the value '7/18/2013'. Each field has a small calendar icon to its right. At the bottom right of the page, there is a button labeled 'Generate Report'.

By default on the **Acceptability Factor** page

- **Start Date** is 30 days prior to the current date.
- **End Date** is the current date.

Generating an Acceptability Factor Report

To generate an Acceptability Factor report

1. Select or enter a **Start Date** and an **End Date**.
2. Click **Generate Report**.

Acceptability Factor

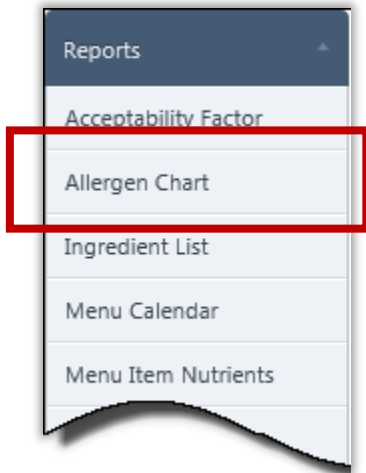
Start Date: 4/1/2013 End Date: 4/30/2013

Generate Report

Acceptability Factor From: 4/1/2013 To: 4/30/2013

Menu Item Category	Menu Item	# of Schools Served	Total Served Count	Total Meal Count	Percent %
Site Group: High School; Meal Service: Breakfast; Serving Date: 04/30/2013; Line: Regular					
Extra	Apple Honey Crisp C-02A	1	5 (2 CN-Piece)	4	125.00
Extra	Apple Honey Crisp C-02A	1	20 (1 CN-Piece)	4	500.00
Extra	Snack Meal2	1	5 (1 5 oz slice)	4	125.00
Extra	Snack Meal2	1	20 (1 CN-slice,)	4	500.00
Extra	Spaghetti	1	25 (2 oz.)	4	625.00
Non-Reimbursable	Lunch Meal	1	25 (1 CN-portion)	4	625.00
Site Group: High School; Meal Service: Breakfast; Serving Date: 04/01/2013; Line: Regular					
Extra	Milk	1	120 (1 CN-FL OZ)	120	100.00
Extra	Orange Juice-Shared menu item-w/cost	1	76 (1 c.)	75	101.33
Site Group: High School; Meal Service: Breakfast; Serving Date: 04/07/2013; Line: Breakfast - In Class					
Extra	Orange Juice-Shared menu item-w/cost	1	100 (1 c.)	99	101.01
Site Group: Elementary School; Meal Service: Lunch; Serving Date: 04/19/2013; Line: Regular					
SC - Fruit	Applesauce, mixed berry, 72/4 oz cup; as purchased	1	0 (4 oz.)	610	0.00
SC - Fruit	Strawberries, raw	1	495 (1 CN-CUP, ha)	610	81.15
SC - Milk	Milk, chocolate, fluid, commercial, lowfat	1	467 (1 c.)	610	76.56
SC - Milk	SC-Skim Milk, Unflavored	1	313 (1 c.)	610	51.31
SC - Salad	SC-Chef Salad	1	195 (2 c.)	610	31.97
SC - Salad	SC-Chef Salad	1	199 (3 c.)	610	32.62
SC - Salad	SC-Chicken Salad	1	502 (12 oz.)	610	82.30
Site Group: Elementary School; Meal Service: Lunch; Serving Date: 04/22/2013; Line: Regular					
SC - Fruit	Applesauce, mixed berry, 72/4 oz cup; as purchased	1	12 (4 oz.)	2	600.00
SC - Fruit	SC-Banana	1	12 (1 CN-CUP, ma)	2	600.00
SC - Milk	SC-Skim Milk, Unflavored	1	12 (1 c.)	2	600.00
SC - Salad	SC-Chef Salad	1	0 (3 c.)	2	0.00
SC - Salad	SC-Chef Salad	1	12 (2 c.)	2	600.00
Site Group: Elementary School; Meal Service: Lunch; Serving Date: 04/30/2013; Line: Regular					
SC - Fruit	Applesauce, mixed berry, 72/4 oz cup; as purchased	1	12 (4 oz.)	2	600.00
SC - Fruit	SC-Banana	1	12 (1 CN-CUP, ma)	2	600.00
SC - Milk	SC-Skim Milk, Unflavored	1	12 (1 c.)	2	600.00
SC - Salad	SC-Chef Salad	1	0 (3 c.)	2	0.00
SC - Salad	SC-Chef Salad	1	12 (2 c.)	2	600.00

Allergen Chart



The Allergen Chart report provides a list of all allergens found in the Menu Items for:

- All active Menu Items
- All Menu Items on Active Menus
- All Menu Items on Menus for a selected date range.

Allergen Chart Page

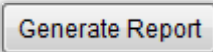
A screenshot of the 'Allergen Chart' report generation page. The page has a dark blue header with the title 'Allergen Chart' and a small icon on the right. Below the header, there is a section titled 'Select a Report' containing three radio button options: 'All Active Menu Items' (which is selected), 'Menu Items on Active Menus', and 'Menu Items on Menus for a timeframe'. At the bottom right of the page, there is a button labeled 'Generate Report'.

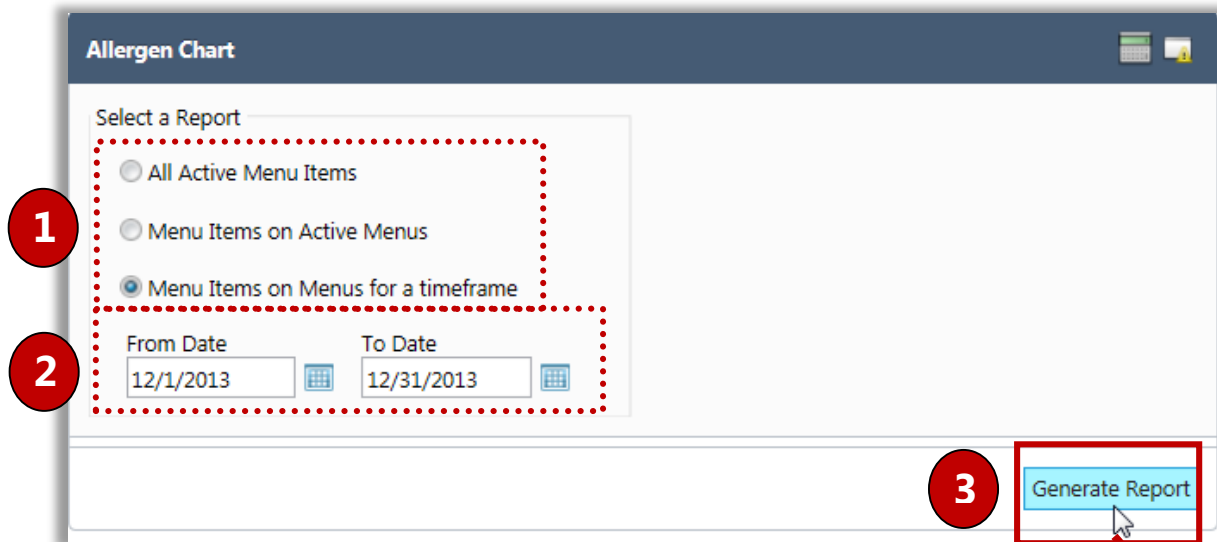
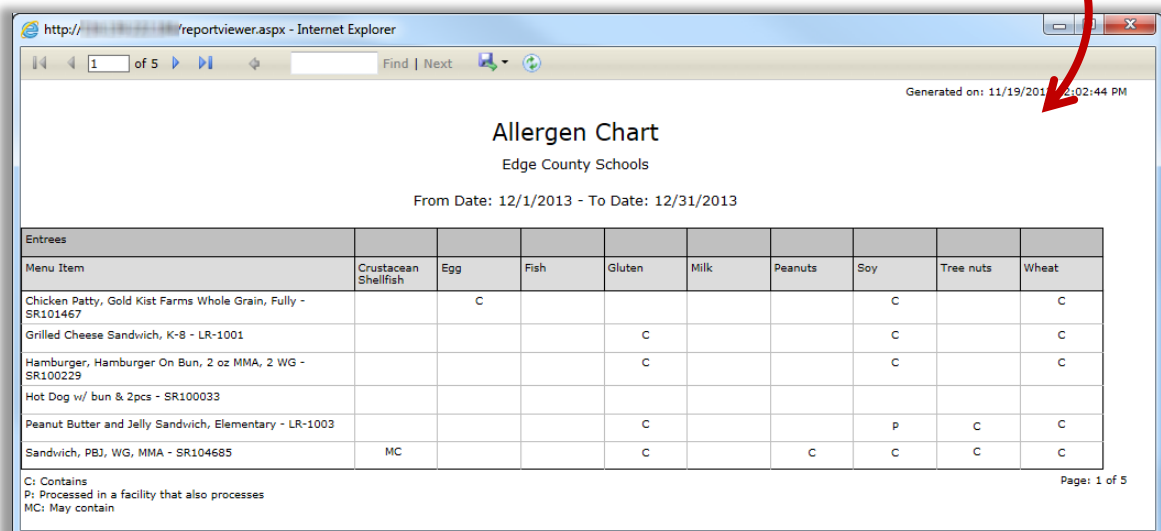
By default on the **Allergen Chart** page

- **All Active Menu Items** report option is selected.

Generating an Allergen Chart

To generate an Allergen Chart

1. Select one report option.
2. If the **Menu Items on Menus for a timeframe** option is selected, enter or select a beginning and ending date.
3. Click .

Generated on: 11/19/2013 2:02:44 PM

Allergen Chart

Edge County Schools

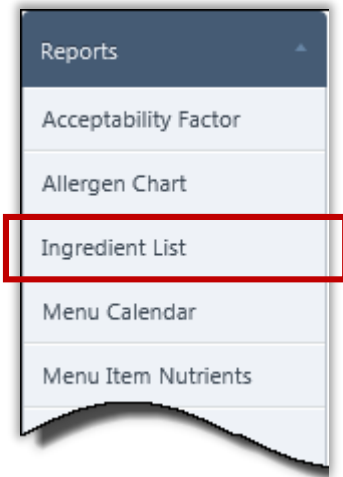
From Date: 12/1/2013 - To Date: 12/31/2013

Entrees	Crustacean Shellfish	Egg	Fish	Gluten	Milk	Peanuts	Soy	Tree nuts	Wheat
Chicken Patty, Gold Kist Farms Whole Grain, Fully - SR101467		C					C		C
Grilled Cheese Sandwich, K-8 - LR-1001				C			C		C
Hamburger, Hamburger On Bun, 2 oz MMA, 2 WG - SR100229				C			C		C
Hot Dog w/ bun & 2pcs - SR100033									
Peanut Butter and Jelly Sandwich, Elementary - LR-1003				C			P	C	C
Sandwich, PBJ, WG, MMA - SR104685	MC			C		C	C	C	C

C: Contains
P: Processed in a facility that also processes
MC: May contain

Page: 1 of 5

Ingredient List



Ingredient List generates a report of nutrients for a selected set of Ingredients. Ingredients are specified with a tag, data source, and form (“As Purchased”, “As Served”, or both).

One page is generated for each Ingredient. The report can be printed or exported to one of seven formats: XML, CVS, PDF, MHTL, TIFF, Excel or Word.

Ingredient List Page

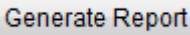
A screenshot of the 'Ingredient List' page in a software application. The page has a dark blue header with the title 'Ingredient List'. Below the header, there are three dropdown menus: 'Tag(s)' with the placeholder text 'Enter the name of the tag or select from the list...', 'Form' with the value '-- ALL --', and 'Data Source' with the value 'Local'. At the bottom right of the page, there is a button labeled 'Generate Report'.

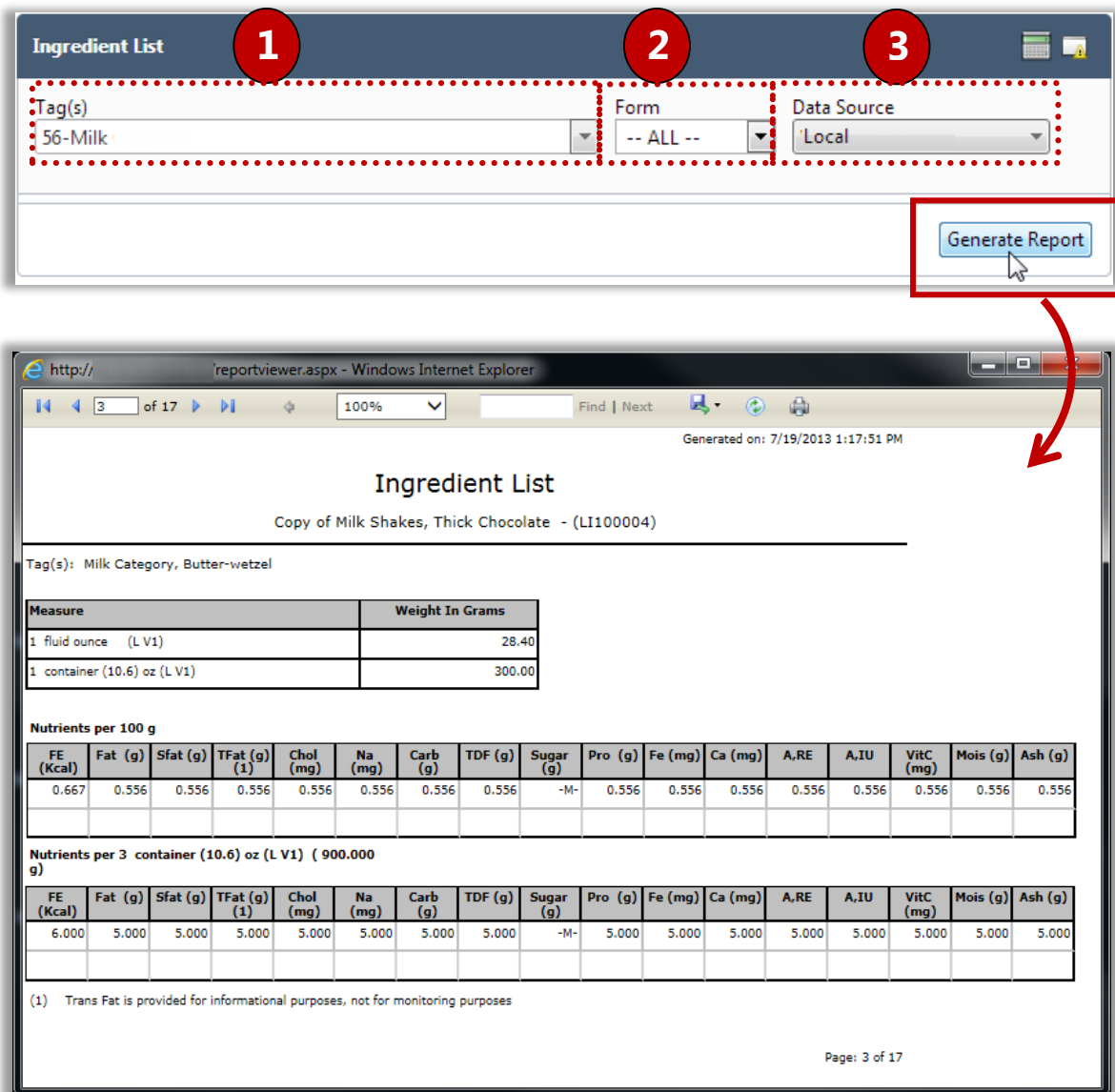
By default on the **Ingredient List** page

- **Tags** displays directions for selecting one tag to identify the group of recipes for which to print nutrition information; no tags are selected.
- **Form** is set to “ALL” which includes both “as Purchased” and “As Served” forms.
- **Data Source** is set to “Local”.

Generating an Ingredient List Report

To generate an Ingredient List report

1. Select one or more tags, separating multiple tags with semicolons.
2. Select a **Form**, if needed.
3. Select a **Data Source**, if needed.
4. Click .



The screenshot shows the 'Ingredient List' report generation interface. The interface includes three numbered steps: 1. Select Tag(s) (56-Milk), 2. Select Form (-- ALL --), and 3. Select Data Source (Local). A red box highlights the 'Generate Report' button. An arrow points from the button to the resulting report.

The resulting report is titled 'Ingredient List' and is a 'Copy of Milk Shakes, Thick Chocolate - (LI100004)'. It shows the following data:

Tag(s): Milk Category, Butter-wetzel

Measure	Weight In Grams
1 fluid ounce (L V1)	28.40
1 container (10.6) oz (L V1)	300.00

Nutrients per 100 g

FE (Kcal)	Fat (g)	Sfat (g)	TFat (g) (1)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)	Pro (g)	Fe (mg)	Ca (mg)	A,RE	A,IU	VitC (mg)	Mois (g)	Ash (g)
0.667	0.556	0.556	0.556	0.556	0.556	0.556	0.556	-M-	0.556	0.556	0.556	0.556	0.556	0.556	0.556	0.556

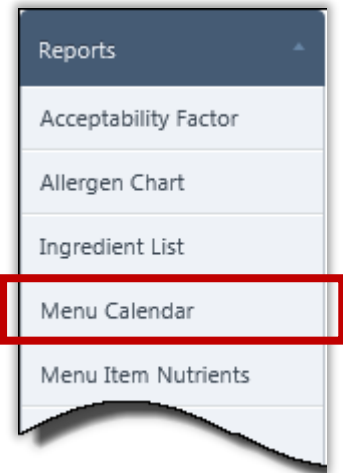
Nutrients per 3 container (10.6) oz (L V1) (900.000 g)

FE (Kcal)	Fat (g)	Sfat (g)	TFat (g) (1)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)	Pro (g)	Fe (mg)	Ca (mg)	A,RE	A,IU	VitC (mg)	Mois (g)	Ash (g)
6.000	5.000	5.000	5.000	5.000	5.000	5.000	5.000	-M-	5.000	5.000	5.000	5.000	5.000	5.000	5.000	5.000

(1) Trans Fat is provided for informational purposes, not for monitoring purposes

Page: 3 of 17

Menu Calendar



Menu Calendar displays either:

- Menu Calendar - report of Menu Items served on each date for a selected month, site, Site Group, Meal Type and Menu Line.
- Menu Calendar Nutrients – report of nutrients for each menu item served on each day for a selected month, site, Site Group, Meal Type and Menu Line.

Menu Calendar Page

 A screenshot of the 'Menu Calendar' report configuration window. The window has a title bar 'Menu Calendar'. Inside, there are several input fields: 'Meal Type' (dropdown with '-- SELECT --'), 'Site Group' (dropdown with '-- SELECT --'), 'Site' (dropdown), 'Menu Line' (dropdown), and 'Calendar Month' (text field with 'July, 2013' and a calendar icon). Below these are two radio button options: 'Menu Calendar Report' (selected) and 'Menu Calendar Nutrients'. Under 'Menu Calendar Report' is a checked checkbox 'Show Summary Items Only'. Under 'Menu Calendar Nutrients' are 'Serving Group' (dropdown) and 'Nutrients Option' (dropdown with 'All'). A 'Generate Report' button is at the bottom right.

By default, on the **Menu Calendar** page:

- **Meal Type** and **Site Group** are set to “SELECT”.
- **Site** and **Menu Line** are blank [empty].
- **Calendar Month** is set to the current month and year.
- **Menu Calendar Report** option is selected.
- **Show Summary Item Only** option is selected (display only the name for menu items that have **Show in Summary** selected on the **Menu Item** tab on the **Recipe** page (see **Chapter 1: Ingredients > Creating a Menu Item on page 40**).

Generating a Menu Calendar Report

To generate a Menu Calendar report

1. Select **Meal Type**, **Site Group**, and **Menu Line**; select **Site** and **Calendar Month**, if needed.
2. Clear **Show Summary Items Only** to include detailed Menu Item descriptions.
3. Click **Generate Report**.

The screenshot shows the 'Menu Calendar' report generation interface. A red dashed box highlights the selection fields: Meal Type (Lunch), Site Group (Elementary School), Site (-- ALL --), Menu Line (Regular), and Calendar Month (September, 2013). A red circle with the number '1' points to these fields. Below them, the 'Menu Calendar Report' radio button is selected, and the 'Show Summary Items Only' checkbox is checked. A red circle with the number '2' points to the 'Show Summary Items Only' checkbox. The 'Serving Group' is set to '-- SELECT --' and the 'Nutrients Option' is set to 'All'. A red box highlights the 'Generate Report' button, with a red arrow pointing from it to the report preview below.

The report preview shows the 'Menu Calendar Report - December, 2013' for 'Edge County Schools'. The report details the menu for 'School - GEORGE WASHINGTON ELEMENTARY', 'Site Group - Elementary School', 'Meal Type - Lunch', and 'Menu Line - Lunch - Pizza Line'. The report is generated on 11/19/2013 10:52:07 AM.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1 Dec	2 Dec	3 Dec	4 Dec	5 Dec	6 Dec	7 Dec
	Grilled Cheese Sandwich, K-8 Sandwich, PBJ, WG, MMA Carrots, Baby, Fresh, Peeled, Veg-RO Corn, Seasoned Corn With Margarine, Veg-S Apple, Ravv, Whole with Skin, F Oranges, Ravv, All Commercial Varieties, F Milk, 1% Lowfat Milk, Milk Milk, Chocolate, Fat Free, Turner Dairy, Milk	Grilled Cheese Sandwich, K-8 Sandwich, PBJ, WG, MMA Carrots, Baby, Fresh, Peeled, Veg-RO Corn, Seasoned Corn With Margarine, Veg-S Apple, Ravv, Whole with Skin, F Oranges, Ravv, All Commercial Varieties, F Milk, 1% Lowfat Milk, Milk Milk, Chocolate, Fat Free, Turner Dairy, Milk	Grilled Cheese Sandwich, K-8 Sandwich, PBJ, WG, MMA Carrots, Baby, Fresh, Peeled, Veg-RO Corn, Seasoned Corn With Margarine, Veg-S Apple, Ravv, Whole with Skin, F Oranges, Ravv, All Commercial Varieties, F Milk, 1% Lowfat Milk, Milk Milk, Chocolate, Fat Free, Turner Dairy, Milk	Grilled Cheese Sandwich, K-8 Sandwich, PBJ, WG, MMA Carrots, Baby, Fresh, Peeled, Veg-RO Corn, Seasoned Corn With Margarine, Veg-S Apple, Ravv, Whole with Skin, F Oranges, Ravv, All Commercial Varieties, F Milk, 1% Lowfat Milk, Milk Milk, Chocolate, Fat Free, Turner Dairy, Milk	Grilled Cheese Sandwich, K-8 Sandwich, PBJ, WG, MMA Carrots, Baby, Fresh, Peeled, Veg-RO Corn, Seasoned Corn With Margarine, Veg-S Apple, Ravv, Whole with Skin, F Oranges, Ravv, All Commercial Varieties, F Milk, 1% Lowfat Milk, Milk Milk, Chocolate, Fat Free, Turner Dairy, Milk	
8 Dec	9 Dec	10 Dec	11 Dec	12 Dec	13 Dec	14 Dec
Pasta, Spaghetti and Meat Sauce (Ground Turkey), W Pasta, Spaghetti and Meatballs, MMA, Non-WG, Veg-R	Pasta, Spaghetti and Meat Sauce (Ground Turkey), W Pasta, Spaghetti and Meatballs, MMA, Non-WG, Veg-R	Pasta, Spaghetti and Meat Sauce (Ground Turkey), W Pasta, Spaghetti and Meatballs, MMA, Non-WG, Veg-R	Pasta, Spaghetti and Meat Sauce (Ground Turkey), W Pasta, Spaghetti and Meatballs, MMA, Non-WG, Veg-R	Pasta, Spaghetti and Meat Sauce (Ground Turkey), W Pasta, Spaghetti and Meatballs, MMA, Non-WG, Veg-R	Pasta, Spaghetti and Meat Sauce (Ground Turkey), W Pasta, Spaghetti and Meatballs, MMA, Non-WG, Veg-R	
15 Dec	16 Dec	17 Dec	18 Dec	19 Dec	20 Dec	21 Dec
Grilled Cheese Sandwich, K-8 Sandwich, PBJ, WG, MMA Carrots, Baby, Fresh, Peeled, Veg-RO Corn, Seasoned Corn With Margarine, Veg-S Apple, Ravv, Whole with Skin, F Oranges, Ravv, All Commercial Varieties, F Milk, 1% Lowfat Milk, Milk Milk, Chocolate, Fat Free, Turner Dairy, Milk	Chicken Patty, Gold Kist Farms Whole Grain, Fully Broccoli, Broccoli and Ranch, Veg-DG Apple Sauce, Single Serve Cups Loose Pack Cases, K Apple, Baked W/ Cinnamon, F Beverage, Milk, Variety, 133/8 oz Servings, Milk Beverage, Milk, Variety, 161/8 oz Servings, Milk	Hamburger, Hamburger On Bun, 2 oz MMA, 2 WG Hot Dog w/ bun & 2pcs	Chicken Patty, Gold Kist Farms Whole Grain, Fully Broccoli, Broccoli and Ranch, Veg-DG Apple Sauce, Single Serve Cups Loose Pack Cases, K Apple, Baked W/ Cinnamon, F Beverage, Milk, Variety, 133/8 oz Servings, Milk	Grilled Cheese Sandwich, K-8 Hamburger, Hamburger On Bun, 2 oz MMA, 2 WG Sandwich, PBJ, WG, MMA Carrots, Baby, Fresh, Peeled, Veg-RO Corn, Seasoned Corn With Margarine, Veg-S Apple, Ravv, Whole with		

Generating a Menu Calendar Nutrients Report

To generate a Menu Calendar Nutrient report

1. Select **Meal Type**, **Site Group**, and **Menu Line**; select **Site** and **Calendar Month**, if needed.
2. Select **Menu Calendar Nutrients**.
3. Select a **Serving Group** and change the **Nutrient Option**, if needed.
4. Click **Generate Report**.

Menu Calendar

Meal Type: Lunch | Site Group: Elementary School | Site: -- ALL --

Menu Line: Regular | Calendar Month: September, 2013

Menu Calendar Nutrients

Serving Group: K-5 | Nutrients Option: Simplified

Generate Report

Menu Calendar Nutrient Analysis Report - December, 2013

Edge County Schools

School - GEORGE WASHINGTON ELEMENTARY

Meal Type - Lunch | Site Group - Elementary School

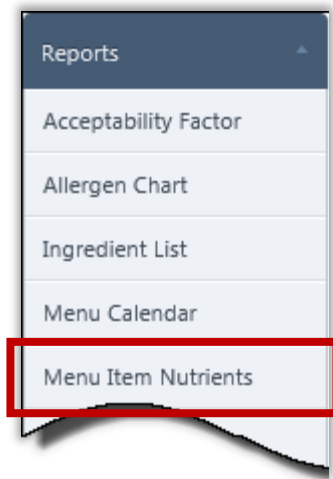
Menu Line - Lunch - Pizza Line | Serving Group - K-5

Item Name (Serving Size)	Planned Qty	FE (Kcal)	Fat (g)	Sfat (g)	Tfat (g)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)	Pro (g)	Fe (mg)	Ca (mg)	A,RE	A,IU	VitC (mg)	Mois (g)	Ash (g)
3039: Spaghetti with Meatballs Lunch - ServingDate: 12/09/2013																		
Pasta, Spaghetti and Meat Sauce (Ground Turkey), W - SR103500 (1 1/2 c.)	0	318.43	6.43	1.38	0.00	55.00	404.00	44.20	6.20	-M-	24.41	2.92	60.01	0.80	404.00	15.00	0.00	0.00
Pasta, Spaghetti and Meatballs, MMA, Non-WG, Veg-F - SR100022 (1/2 serv.)	0	214.75	6.56	2.02	0.00	17.72	501.56	27.79	2.02	4.03	11.13	7.58	40.25	10.13	300.63	8.11	-M-	-M-
3039: Spaghetti with Meatballs Lunch - ServingDate: 12/10/2013																		
Pasta, Spaghetti and Meat Sauce (Ground Turkey), W - SR103500 (1 1/2 c.)	0	318.43	6.43	1.38	0.00	55.00	404.00	44.20	6.20	-M-	24.41	2.92	60.01	0.80	404.00	15.00	0.00	0.00
Pasta, Spaghetti and Meat Sauce (Ground Turkey), W - SR103500 (1 1/2 c.)	0	214.75	6.56	2.02	0.00	17.72	501.56	27.79	2.02	4.03	11.13	7.58	40.25	10.13	300.63	8.11	-M-	-M-
Week 1 Day 1 Elementary - ServingDate: 12/19/2013																		
Chicken Patty, Gold Kist Farms Whole Grain, Fully - SR101467 (1 patty (2.0))	0	216.00	12.00	2.00	0.00	62.00	370.00	13.00	2.00	1.00	14.00	2.00	29.00	14.60	73.00	11.00	-M-	-M-
Broccoli, Broccoli and Ranch, Veg-DG - SR103735 (1/2 cup, chop)	0	155.47	13.17	2.02	0.00	10.00	395.01	10.02	1.18	2.00	1.28	0.33	41.38	70.00	0.00	0.00	0.00	0.00
Apple Sauce, Single Serve Cups Loose Pack Cases, K - SR100701 (1 Container)	100	90.00	0.00	0.00	0.00	0.00	10.00	22.00	2.00	19.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Apple, Baked W/ Cinnamon, F - SR102432 (1/2 cup (1/2 c))	0	55.23	0.00	0.00	0.00	0.00	4.61	14.25	0.96	0.00	0.00	1.32	1.10	0.03	0.31	1.09	0.01	0.00
Beverage, Milk, Variety, 133/8 oz Servings, Milk - SR102643 (8 fl. oz.)	0	125.64	0.23	0.14	0.00	5.89	158.12	22.35	0.00	20.54	8.20	0.14	300.00	100.00	500.00	2.40	-M-	-M-

Page: 1 of 2

"All" Nutrients Option

Menu Item Nutrients



Menu Item Nutrients generates a report of nutrient information for all menu items for a selected data source, Meal Pattern and Serving Group. Allergen information is included with each Menu Item name, when available.

The report can be printed or exported to one of seven formats: XML, CVS, PDF, MHTL, TIFF, Excel or Word.

Menu Item Nutrients Page

A screenshot of the 'Menu Item Nutrients' report generation page. At the top, there are three dropdown menus: 'Data Source' (set to 'Local'), 'Meal Pattern' (set to '-- SELECT --'), and 'Serving Group' (blank). Below these is a section with a 'Select All' checkbox and a grid of 12 individual nutrient checkboxes: Food Energy, Total Fat, Saturated Fat, Trans Fat, Cholesterol, Sodium, Carbohydrate, Total Dietary Fiber, Protein, Iron, Calcium, Vitamin A (RE), Vitamin A (IU), Vitamin C, Moisture, and Ash. All checkboxes are currently unchecked. At the bottom right is a 'Generate Report' button.

By default, on the **Menu Item Nutrients** page:

- **Data Source** is set to “Local”.
- **Meal Pattern** is set to “SELECT”.
- **Serving Group** is blank [empty].
- No nutrients are selected.

Generating a Menu Item Nutrients Report

To generate a Menu Item Nutrients report

1. Select a **Data Source**, if needed.
2. Select a **Meal Pattern** (required).
3. Select a **Serving Group** (required).
4. Select **Select All** or one or more nutrients.
5. Click **Generate**.

The screenshot shows the 'Menu Item Nutrients' report generation interface. The interface includes dropdown menus for 'Data Source' (Local), 'Meal Pattern' ([USDA]Meal Pattern SY 2012-2014), and 'Serving Group' (K-5). Below these are checkboxes for 'Select All' and various nutrients. The 'Generate Report' button is highlighted with a red box and a red arrow pointing to the resulting report.

Menu Item Nutrient Report
Edge County Schools

Meal Pattern: [USDA]Meal Pattern SY 2012-2014
Serving Group: K-5
Data Source: Local

Item Name (Serving Size)	FE (Kcal)	Fat (g)	Sfat (g)	Na (mg)	Ca (mg)
Beans, Black (Turtle), MMA - LR-1009 (1/2 c.)	109.00	0.35	0.10	140.00	42.00
Blueberry Muffin, Super Bakery, 9040 - LR-1000 (1 ea.) Contains Milk, Egg, Wheat, Gluten.	160.00	3.50	1.00	190.00	0.00
Copy of Beans, Black, Canned; black, seasoned, brine sauce, 6/#10 (108 oz); as purchased - LR-1010 (1/2 c.)	109.99	0.00	0.00	599.99	43.99
Frozen Juice, Strawberry-Mango, Sidekicks, 100% Juice, Ridgefield's, 225890 - LR-1008 (1 Container)	80.00	0.00	0.00	45.00	80.00
Grilled Cheese 9-12 - LR-1006 (1 sandwich) Contains Wheat, Soy, Gluten.	240.29	7.79	2.81	685.09	438.13
Grilled Cheese K-8 - LR-1005 (1 sandwich) Contains Wheat, Soy, Gluten.	240.29	7.79	2.81	685.09	438.13
Grilled Cheese Sandwich, K-8 - LR-1001 (1 sandwich) Contains Wheat, Soy, Gluten.	248.33	8.67	2.92	723.33	437.15
Honey Bun, Super Bakery, 6012 - LR-1002 (1 ea.) Contains Milk, Egg, Wheat, Soy.	310.00	15.00	5.00	190.00	100.00
Peanut Butter and Jelly Sandwich, Elementary - LR-1003 (1 sandwich) Contains Wheat, Soy, Gluten.	403.60	19.13	4.29	726.88	93.76
Ultra Muffin - Banana, Super Bakery, 9052 - LR-1004 (1 ea.) Contains Milk, Egg, Wheat.	180.00	6.00	1.00	125.00	80.00

Legend
(M) - Missing Nutrient Values

Page: 1 of 1

Nutrient Standards



Nutrient Standards lists all current nutrient standards (requirements) for each serving group in a selected Meal Pattern as specified by the USDA.

The report can be printed or exported to one of seven formats: XML, CVS, PDF, MHTL, TIFF, Excel or Word.

Nutrient Standards Page

A screenshot of the 'Nutrient Standards' page in the software. The page has a dark blue header with the title 'Nutrient Standards'. Below the header, there are two dropdown menus: 'Meal Pattern' and 'Meal Type'. The 'Meal Pattern' dropdown is set to '[USDA]Meal Pattern SY 2012-2014' and the 'Meal Type' dropdown is set to 'Lunch'. At the bottom right of the page, there is a button labeled 'Generate Report'.

By default on the **Nutrient Standards** page:

- **Meal Pattern** is set to “[USDA] Meal Pattern SY 2012-2014”.
- **Meal Type** is set to “Lunch”.

Generating a Nutrient Standards Report

To generate a Nutrient Standards report

1. Select a **Meal Pattern**.
2. Select a **Meal Type**.
3. Click **Generate Report**.

Nutrient Standards

Meal Pattern: [USDA]Meal Pattern SY 2012-2014

Meal Type: Lunch

Generate Report

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Nutrient Standards

Edge County Schools

Meal Pattern: [USDA]Meal Pattern SY 2012-2014 Meal Service: Breakfast

Serving Group	Nutrient Name	USDA Standard
6-8		
	Saturated Fat	< 10.000% calories
	Food Energy	[400.000 - 550.000]
9-12		
	Food Energy	[450.000 - 600.000]
	Saturated Fat	< 10.000% calories
K-5		
	Saturated Fat	< 10.000% calories
	Food Energy	[350.000 - 500.000]
K-8		
	Food Energy	[400.000 - 500.000]
	Saturated Fat	< 10.000% calories

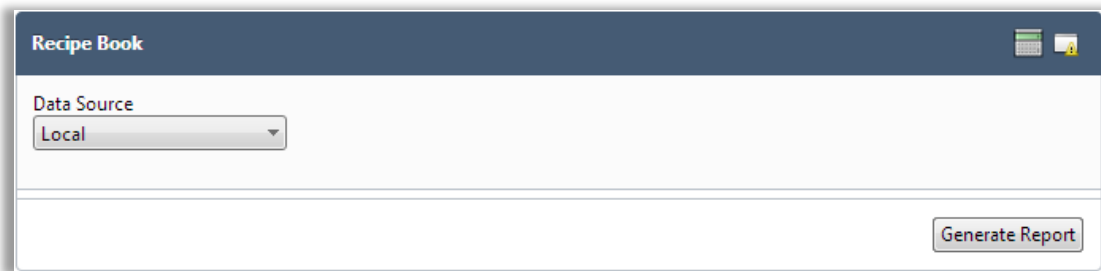
Page: 1 of 1

Recipe Book



Recipe Book prints each recipe included in a selected Data Source on individual pages to allow compilation into a printed book. Detailed nutrition information for all recipe ingredients is provided.

Recipe Book Page



By default on the **Recipe Book** page:

- **Data Source** is set to “**Local**”.

Generating a Recipe Book

Generating a recipe book includes all recipes in the selected database, and therefore can require a lengthy time to generate the report, to print the report, as well require a large volume of paper for printout. Use your resources carefully!

After generation, book can be printed or saved to a file, such as a PDF or MS Word document.

To generate a Recipe book

1. Select a **Data Source**, if needed.
2. Click **Generate Report**.



http:// /reportviewer.aspx - Windows Internet Explorer

8 of 9 ? 100% Find | Next

Marks Pecan Pies (LR100006)

Number of Servings:	1	Serving Size:	1 Slice
Moisture gain/loss%:	0.0000	Yield:	6 Ounce
Waste gain/loss%:	0.0000	Fat gain/loss% :	0.0000

Stock Item#	Stock Item	Stock Quantity	Ingredient Name	Quantity
			Marks Pecan Pies LI100005	1 Slice

Nutritional Information

	Fat	SFat	Carb	Protein	Sugar
% of Calories	18.00	6.00	26.67	5.33	(M)

Nutrients per 100 g

FE (Kcal)	Fat (g)	Sfat (g)	TFat (g) (1)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)	Pro (g)	Fe (mg)	Ca (mg)	A,RE	A,IU	VitC (mg)	Mois (g)	Ash (g)
88.183	1.764	0.588	0.176	2.352	0.000	5.879	0.588	Missing	1.176	0.588	0.294	0.176	0.882	0.353	0.294	1.176

Nutrients per serving (170.1 g)

FE (Kcal)	Fat (g)	Sfat (g)	TFat (g) (1)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)	Pro (g)	Fe (mg)	Ca (mg)	A,RE	A,IU	VitC (mg)	Mois (g)	Ash (g)
150.000	3.000	1.000	0.300	4.000	0.000	10.000	1.000	Missing	2.000	1.000	0.500	0.300	1.500	0.600	0.500	2.000

(1) Trans Fat is provided for informational purposes, not for monitoring purposes

Recipe Costing Report



Recipe Costing provides the cost to produce each recipe for the district. Recipe Material cost and Cost per Serving is listed for each recipe.

Recipe Costing Report Page

A screenshot of the 'Recipe Costing Report' page. The page has a dark blue header with the title 'Recipe Costing Report' and a small icon. Below the header, there is a section labeled 'Generate report for' followed by a dropdown menu showing 'School System'. At the bottom right of the page, there is a button labeled 'Generate Report'.

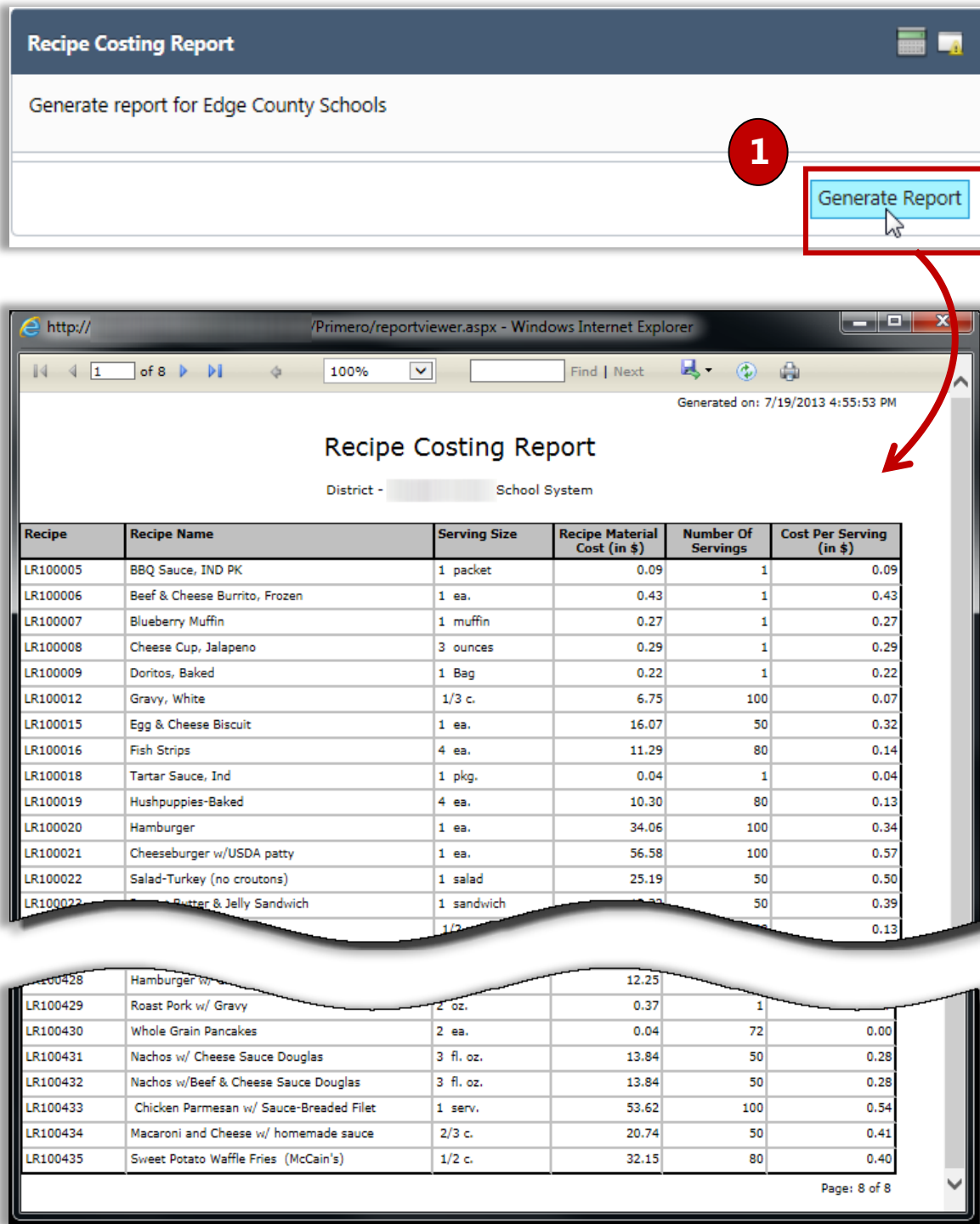
By default on the **Recipe Costing Report** page:

- No options or entries are available or required.

Generating a Recipe Costing Report

To generate a Recipe Costing Report

1. Click **Generate Report**.



Recipe Costing Report

Generate report for Edge County Schools

1 **Generate Report**

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Generated on: 7/19/2013 4:55:53 PM

Recipe Costing Report

District - School System

Recipe	Recipe Name	Serving Size	Recipe Material Cost (in \$)	Number Of Servings	Cost Per Serving (in \$)
LR100005	BBQ Sauce, IND PK	1 packet	0.09	1	0.09
LR100006	Beef & Cheese Burrito, Frozen	1 ea.	0.43	1	0.43
LR100007	Blueberry Muffin	1 muffin	0.27	1	0.27
LR100008	Cheese Cup, Jalapeno	3 ounces	0.29	1	0.29
LR100009	Doritos, Baked	1 Bag	0.22	1	0.22
LR100012	Gravy, White	1/3 c.	6.75	100	0.07
LR100015	Egg & Cheese Biscuit	1 ea.	16.07	50	0.32
LR100016	Fish Strips	4 ea.	11.29	80	0.14
LR100018	Tartar Sauce, Ind	1 pkg.	0.04	1	0.04
LR100019	Hushpuppies-Baked	4 ea.	10.30	80	0.13
LR100020	Hamburger	1 ea.	34.06	100	0.34
LR100021	Cheeseburger w/USDA patty	1 ea.	56.58	100	0.57
LR100022	Salad-Turkey (no croutons)	1 salad	25.19	50	0.50
LR100022	Butter & Jelly Sandwich	1 sandwich	19.99	50	0.39
LR100022		1/2			0.13
LR100428	Hamburger w/		12.25		
LR100429	Roast Pork w/ Gravy	2 oz.	0.37	1	
LR100430	Whole Grain Pancakes	2 ea.	0.04	72	0.00
LR100431	Nachos w/ Cheese Sauce Douglas	3 fl. oz.	13.84	50	0.28
LR100432	Nachos w/Beef & Cheese Sauce Douglas	3 fl. oz.	13.84	50	0.28
LR100433	Chicken Parmesan w/ Sauce-Breaded Filet	1 serv.	53.62	100	0.54
LR100434	Macaroni and Cheese w/ homemade sauce	2/3 c.	20.74	50	0.41
LR100435	Sweet Potato Waffle Fries (McCain's)	1/2 c.	32.15	80	0.40

Page: 8 of 8

Recipe Nutrition



Recipe Nutrition produces a report that lists all nutrient information per serving and per 100 gms for all recipes that share a selected tag.

The report can be printed or exported to one of seven formats: XML, CVS, PDF, MHTL, TIFF, Excel or Word.

Recipe Nutrition Page

A screenshot of the 'Recipe Nutrition' page in a software application. The page has a dark blue header with the title 'Recipe Nutrition' and a small icon. Below the header, there are two input fields: 'Tags' and 'Data Source'. The 'Tags' field is a text box with a dropdown arrow, containing the placeholder text 'Enter the name of the tag or select from the list...'. The 'Data Source' field is a dropdown menu with 'Local' selected. At the bottom right of the page, there is a button labeled 'Generate Report'.

By default on the **Recipe Nutrition** page:

- **Tags** displays directions for entering or selecting the tag to identify the group of recipes for which to print nutrition information.
- **Data Source** is set to “**Local**”.

Generating a Recipe Nutrition Report

To generate a Recipe Nutrition Report

1. Select *one* recipe tag (multiple tags cannot be selected).
2. Select a **Data Source**, if needed.
3. Click **Generate Report**.

The screenshot shows the 'Recipe Nutrition' form. Step 1 points to the 'Tags' dropdown menu, which is currently set to 'Breakfast'. Step 2 points to the 'Data Source' dropdown menu, which is currently set to 'Local'. Step 3 points to the 'Generate Report' button.

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Recipe

COUNTY

Bagel Half; Bake Crafters, Individually Wrapped; as served - (LR300043)

Tag(s): CN-Baked goods, CN-breads, CN-cakes, CN-cookies, CN-crackers, CN-pies, CN-rolls

Number of Servings: 1.000 Serving Size: 1 piece

Moisture gain/loss%: 0.000 Fat gain/loss%: 0.000

Waste gain/loss%: 0.000

Ingredient Name	Weight (g)	FE (Kcal)	Fat (g)	Sfat (g)	TFat (g)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)(1)	Pro (g)	Fe (mg)(2)	Ca (mg)(3)	A ₉ RE	A ₉ IU(4)	VHC (mg)(5)	Mois (g)	Ash (g)
Bagel Half; Bake Crafters, Individually Wrapped; as served	28.350	83.000	0.300	0.000	M	0.000	130.000	18.000	0.660	M	2.900	95.400	34.800	0.000	0.000	0.000	M	M
Sub Total	28.350	83.000	0.300	0.000	0.000 (M)	0.000	130.000	18.000	0.660	0.000 (M)	2.900	95.400	34.800	0.000	0.000	0.000	0.000 (M)	0.000 (M)
Fat/Waste/Moist Change	0.000																	
Total	28.350	83.000	0.300	0.000	0.000 (M)	0.000	130.000	18.000	0.660	0.000 (M)	2.900	95.400	34.800	0.000	0.000	0.000	0.000 (M)	0.000 (M)
Per 100g	100.000	292.769	1.058	0.000	0.000 (M)	0.000	458.554	63.492	2.328	0.000 (M)	10.229	336.508	122.751	0.000	0.000	0.000	0.000 (M)	0.000 (M)
Per Serving	28.350	83.000	0.300	0.000	0.000 (M)	0.000	130.000	18.000	0.660	0.000 (M)	2.900	95.400	34.800	0.000	0.000	0.000	0.000 (M)	0.000 (M)

(1) This nutrient was added by the developer and not required by USDA for NSMP
 (2) Please enter either "Actual Value" or "%DRV" for nutrient Iron
 (3) Please enter either "Actual Value" or "%DRV" for nutrient Calcium
 (4) Please enter either "Actual Value" or "%DRV" for nutrient Vitamin A(IU)
 (5) Please enter either "Actual Value" or "%DRV" for nutrient Vitamin C

Page: 2 of 11

Weekly Nutrient Analysis



The Weekly Nutrient Analysis report provides:

- Nutrition Report
- Nutrition Summary Report
- Food Component Report

The reports are generated from the Standard Nutrients footer for a selected week. The week must include a minimum of 3 menus.

After clicking **Analysis Report** the Standard Nutrients footer appears.

Weekly Nutrient Analysis Page

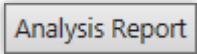
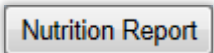
By default on the **Weekly Nutrient Analysis** page:

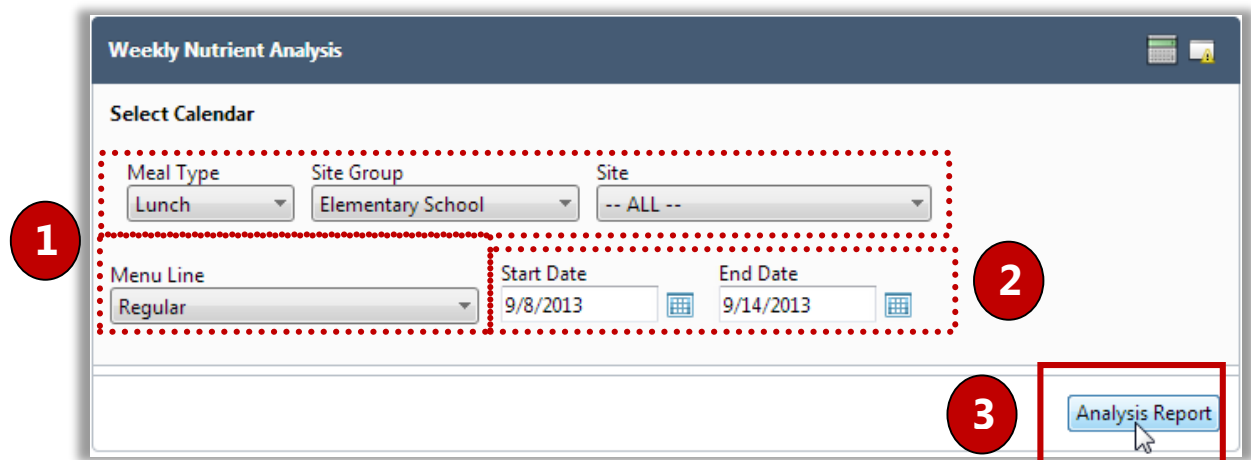
- **Meal Type** and **Site Group** are set to “SELECT”.
- **Site** and **Menu Line** are blank.
- **Start Date** and **End Date** are blank.

Generating a Weekly Nutrient Analysis Report

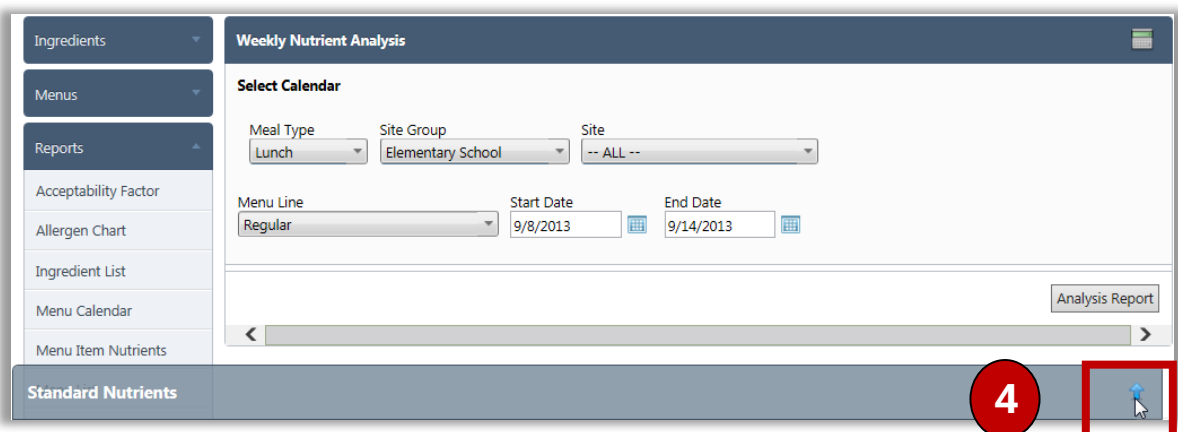
You only need to select a **Start Date** or **End Date**—the other date is automatically calculated for you (seven days after or before the selected date, respectively).

To generate the Standard Nutrient footer for a selected Menu Line and week

1. Select a **Meal Type**, **Site Group**, and **Menu Line**, and **Site**, if needed.
2. Enter or select a **Start Date** and/or **End Date**.
3. Click .
4. Expand the Standard Nutrients footer.
5. Select a **Nutrient Option**, if needed.
6. Click .



The screenshot shows the 'Weekly Nutrient Analysis' form. A red dotted box labeled '1' encloses the 'Meal Type' (Lunch), 'Site Group' (Elementary School), and 'Menu Line' (Regular) dropdowns. A red circle labeled '2' is next to the 'Start Date' (9/8/2013) and 'End Date' (9/14/2013) fields. A red circle labeled '3' is next to the 'Analysis Report' button.



The screenshot shows the 'Weekly Nutrient Analysis' form with a sidebar on the left. The sidebar has a 'Standard Nutrients' section highlighted. A red circle labeled '4' is next to the 'Standard Nutrients' section. A red circle labeled '5' is next to the 'Analysis Report' button.

To generate a Nutrition Report from the Standard Nutrients footer

1. Select a Nutrients Option and a serving group, if needed.

2. Click **Nutrition Report**.

	Standard Value	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
Standard Value	[600.00 - 650.00]	< 10.00 % of Calories	>= 1.500	>= 2.250	>= 0.500	>= 0.500	>= 0.500	>= 0.500	>= 0.250	[5.000 - 5.500]	>= 50.000 % of	[5.500 - 6.000]	>= 3.000	<= 50.000 % of	<= 2.000	<= 50.000 % of	
Actual Value	494.70	3.49	1.875	[3.000 - 3.250]	1.500	1.000	0.000	0.500	0.250	[3.000 - 4.000]	7.000	[3.000 - 3.750]	2.000	0.000	0.000	0.000	Pass
% of Calories/Total		6.34 %									100.00			0.00		0.00	

Menu Weekly Nutrient Analysis Report
Edge County Schools

Menu Names - 3043: Week 1, Day 1 Menu K-8, Tuesday's Menu, Week 1 Day 1 Elementary
Site Group - Elementary School
Meal Pattern - [USDA]Meal Pattern SY 2012-2014
Serving Group - K-8
Meal Type - Lunch
Calculation Method - Weighted Analysis
Result - Fail

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Cycle Week Nutrient Summary				Cycle Week Food Component Summary			
Nutrient	Weekly Standard Value	Actual Value	% of Calories	Food Component	Standard Value	Actual Value	% of Total
FE (Kcal)	[600.00 - 650.00]	494.70		Fruit	>= 1.500	1.875	
Fat (g)	12.50	22.74		Veg	>= 2.250	[3.000 - 3.250]	
Sfat (g)	< 10.00 % of Calories	3.49	6.34	Veg-DG	>= 0.500	1.500	
TFat (g)(1)		0.08		Veg-RO	>= 0.500	1.000	
Chol (mg)		11.69		Veg-BP	>= 0.500	0.000	
Na (mg)		593.95		Veg-S	>= 0.500	0.500	
Carb (g)		83.44	67.47	Veg-O	>= 0.250	0.250	
TDF (g)		10.42		Grains	[5.000 - 5.500]	[3.000 - 4.000]	
Sugar (g)		26.43		Non-WG		0.000	
Pro (g)		18.91	15.29	WG	>= 50.000 % of	7.000	100.00
Fe (mg)		3.29		Meat/MA	[5.500 - 6.000]	[3.000 - 3.750]	
Ca (mg)		423.99		MILK-F	>= 3.000	2.000	
A.RE		918.10		Fruit-J	<= 50.000 % of	0.000	0.00
A.IU				Grain-D	<= 2.000		
VitC (mg)							
Mois (g)							
Ash (g)							

Legend
(M) - Missing Nutrient Values
(1) Trans Fat is provided for information

Category: Vegetables: Choose: 2
Broccoli, Fresh, Boiled, Veg-DG - SR101974 (1/2 Cup (8 oz)) 500 32.90 0.36 0.04 -M- 0.00 31.93 6.42 2.52 -M- 2.73 0.71 45.48 149.02 602.85 86.32 86.41 0.84
Cabbage, Chinese (Pai-Choi), Raw, Veg-DG - SR104008 (1 cup, shred) 500 9.10 0.14 0.02 -M- 0.00 45.50 1.53 0.70 -M- 1.05 0.56 73.50 210.00 3127.60 31.50 66.72 0.56

Category: Fruits: Choose: 2
Apricots, canned, halves, unpeeled, fruit and juice - SR102641 (1/2 cup (1/2 c)) 500 78.11 0.06 0.00 0.00 0.00 4.89 20.37 1.95 -M- 0.66 0.48 13.66 326.50 1632.31 3.32 -M- -M-
Banana, Pectin 150 Count, Raw, Fresh, Packer: F - SR100949 (1 ea.) 500 110.00 0.00 0.00 0.00 0.00 30.00 3.00 19.00 1.00 0.36 0.00 20.00 100.00 9.00 -M- -M-

Category: Milk: Choose: 1
Milk, 1% Lowfat Milk, Milk - SR100974 (1 c) 10 100.00 2.50 1.50 0.00 12.00 110.00 12.00 0.00 12.00 8.00 0.00 300.00 100.00 500.00 0.00 -M- -M-
Milk, 2% Lowfat Milk, Milk - SR100974 (1 c) 10 100.00 2.50 1.50 0.00 12.00 110.00 12.00 0.00 12.00 8.00 0.00 300.00 80.00 400.00 2.40 -M- -M-

Page: 2 of 2

To generate a Nutrition Summary Report from the Standard Nutrients footer

1. Select a serving group, if needed.
2. Click **Nutrition Summary Report**.

Standard Nutrients

Nutrients Option: All

Nutrition Report: **Nutrition Summary Report** Food Component Report

1 K-8 K-5

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-BO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
Standard Value	[600.00 - 650.00]	< 10.00 % of Calories	>= 1.500	>= 2.250	>= 0.500	>= 0.500	>= 0.500	>= 0.500	>= 0.250	[5.000 - 5.500]	>= 50.000 % of	[5.500 - 6.000]	>= 3.000	<= 50.000 % of	<= 2.000	<= 50.000 % of	Pass
Actual Value	494.70	3.49	1.875	[3.000 - 3.250]	1.500	1.000	0.000	0.500	0.250	[3.000 - 4.000]	7.000	[3.000 - 3.750]	2.000	0.000	0.000	0.000	Pass
% of Calories/Total		6.34 %									100.00			0.00		0.00	

2

http://reportviewer.aspx - Internet Explorer

Generated on: 11/19/2013 2:19:53 PM

Menu Weekly Nutrient Summary Report

Edge County Schools

Menu Names - 3043: Week 1, Day 1 Menu K-8, Tuesday's Menu, Week 1 Day 1 Elementary

Site Group - Elementary School Meal Pattern - [USDA]Meal Pattern SY 2012-2014

Serving Group - K-8 Calculation Method - Weighted Analysis

Meal Type - Lunch

Nutrient	Day 1	Day 2	Week Standard Value	Actual Value	% of Calories
FE (Kcal)	833.53	650.57	[600.00 - 650.00]	494.70	
Fat (g)	25.68 (27.72%)	11.82 (16.33%)		12.50	22.74%
Sfat (g)	6.31 (6.82%)	4.14 (5.73%)	< 10.00 % of Calories	3.49	6.34%
TFat (g)(t)	0.25	0.00		0.08	
Chol (mg)	8.89	26.18		11.69	
Na (mg)	958.11	823.73		593.95	
Carb (g)	133.02 (63.83%)	117.30 (72.12%)		83.44	67.47%
TDF (g)	16.44	14.80		10.42	
Sugar (g)	35.49	43.80		26.43	
Pro (g)	28.15 (13.51%)	28.58 (17.37%)		18.91	15.29%
Fe (mg)	4.22	5.65		3.29	
Ca (mg)	671.61	600.35		423.99	
A,RE	1910.43	843.88		918.10	
A,IU	18289.23	6159.33		8,149.52	
VitC (mg)	88.87	134.76		74.54	
Mols (g)	269.36	156.87		142.08	
Ash (g)	0.92	1.68		0.87	

Legend

(M) - Missing Nutrient Values

(t) Trans Fat is provided for informational purposes, not for monitoring purposes

Page: 1 of 1

To generate a Food Component report from the Standard Nutrients footer

1. Select a serving group, if needed.
2. Click **Food Component Report**.

Standard Nutrients

Nutrients Option: All

Buttons: Nutrition Report, Nutrition Summary Report, **Food Component Report**

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
Standard Value	[600.00 - 650.00]	< 10.00 % of Calories	>= 1.500	>= 2.250	>= 0.500	>= 0.500	>= 0.500	>= 0.500	>= 0.250	[5.000 - 5.500]	50.000 % of	[5.500 - 6.000]	>= 3.000	<= 50.000 % of	<= 2.000	<= 50.000 % of	
Actual Value	494.70	3.49	1.875	[3.000 - 3.250]	1.500	1.000	0.000	0.500	0.250	[3.000 - 3.500]	7.000	[3.000 - 3.750]	2.000	0.000	0.000	0.000	Pass
% of Calories/Total		6.34 %									100.00			0.00		0.00	

Weekly Food Component Report

Menu Names - Salad Lunch, Bar-B-Que Lunch, Salad Lunch, Fiesta Lunch, Salad Lunch
 Site Group - Elementary School Meal Pattern - [USDA]Meal Pattern SY 2012-2014
 Serving Group - K-5 Meal Type - Lunch

Fruit (cups)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Minimum Fruits (cups)	[2.000 - 2.500] (Pass)	2.500 (Pass)	[2.000 - 2.500] (Pass)	[1.500 - 2.000] (Pass)	[2.000 - 2.500] (Pass)	[10.000 - 12.000]	≥ 2.500	Pass
Weekly Fruit Juice Limit Requirement	≤ 50.000 % of 12.000 1.000 8.333% Pass							

Vegetables (cups)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Vegetables (cups)	[0.000 - 2.000] (Fail)	0.000 (Fail)	[0.000 - 2.000] (Fail)	[1.250 - 2.500] (Pass)	[0.000 - 2.000] (Fail)	[1.250 - 8.500]	≥ 3.750	Fail
Dark Green	1.000	0.000	1.000	0.250	1.000	3.250	≥ 0.500	Pass
Red/Orange	0.250	0.000	0.250	0.250	1.000	1.000	≥ 0.750	Pass
Beans/Pas (Legumes)	0.000	0.000	0.000	0.500	0.000	0.500	≥ 0.500	Pass
Starchy	0.500	0.000	0.500	1.000	0.500	2.500	≥ 0.500	Pass
Other	0.250	0.000	0.250	1.250	0.250	2.000	≥ 0.500	Pass
Weekly Vegetable Juice Limit Requirement	≤ 50.000 % of 8.500 0.000 0.000% Pass							

Meat / Meat Alternate (oz equivalents)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Meat/Meat Alternates (oz eq)	2.000 (Pass)	[2.000 - 2.500] (Pass)	2.000 (Pass)	[0.500 - 2.000] (Fail)	2.000 (Pass)	[8.500 - 10.500]	[8.000 - 10.000]	Fail

Grains (oz equivalents)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Grains (oz eq)	0.000 (Fail)	[1.000 - 2.000] (Pass)	0.000 (Fail)	[0.000 - 1.500] (Fail)	0.000 (Fail)	[1.000 - 3.500]	[8.000 - 9.000]	Fail
Weekly Whole Grain Rich	≥ 50.000 % of 7.500 5.500 73.333% Pass							
Weekly Grains Total	7.500 5.500 73.333% Pass							
Weekly Whole Grain Rich Total	7.500 5.500 73.333% Pass							
Percent of Whole Grain Rich	73.333% Pass							
At Least Half Whole Grain Rich	Pass							
Grain Based Dessert Total for All Weekly Meals	0.000							
No More Than 2oz Equivalents of Grain Based Desserts	Pass							

Milk (cups)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Minimum Fluid Milk (cups)	1.000 (Pass)	2.000 (Pass)	1.000 (Pass)	1.000 (Pass)	1.000 (Pass)	6.000	≥ 5.000	Pass
Skim/fat-free, unflavored; Skim/fat-free, Flavored; Low-fat (1% or less), unflavored	Fail	Fail	Fail	Fail	Fail	Fail		
Low-fat (1% or less), Flavored								
Reduced fat (2% fat) or whole, unflavored and flavored								

*USDA is offering flexibility for SY 2012-2013 and SY 2013-2014 by allowing SFAs to exceed the maximum amount of grains and meat/meat meal alternates as long as the daily and weekly minimums for these components are met and the calories are within the required range. If you exceed the weekly maximum for grain and/or meat/meat alternates, your report will say that you fail for those categories, but that is acceptable at this time.

Page: 1 of 1

◀ End of Section ▶

5 Configuration

In this chapter you will learn how to:

- ✓ Create and manage categories of Menu Items.
- ✓ Create and manage templates for Menus.
- ✓ Add and remove items on the Standard Menu Item list.
- ✓ Create and manage Menu Lines for a meal service.
- ✓ Add, change and remove Site groups.
- ✓ Configure Meal Service types, Menu Lines, and effective Meal Service start dates for a Site.
- ✓ Create and change Hazard Analysis Critical Control Points and processes used in recipe production.
- ✓ Set up holidays or special occasion days on a calendar used as a template for Menu Calendars.
- ✓ Create, display and manage Meal Patterns.
- ✓ Add a new data source and update version data.

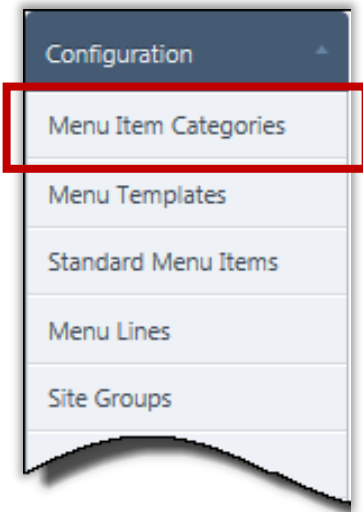
Configuration at a Glance

Menu Function	Description
Menu Item Categories	Create and update categories for Menu Items.
Menu Templates	Create and manage templates for Menus.
Standard Menu Items	Create and remove menu items from the Standard Menu Item list – items that are frequently included on Menus.
Menu Lines	Create and update Menu Lines for each Meal Service.
Site Groups	Create and maintain groups of Sites which are used when creating Menus and Menu Cycles, and assigning Menus.
Site Configuration	Specify the Meal Service(s) and the Menu Item Categories included for each Meal Service for a Site.
HACCP Configuration	Create Hazard Analysis processes and Critical Control Points used in recipe production.
Holiday Schedule	Set up calendar days as holidays or other special occasion days.
Meal Pattern	Display standard Meal Pattern details, and create and manage local Meal Patterns, Serving Groups and Meal Service nutrients.
Data Sources & Versions	Add a local data source and update data source version data.

Note

Menus and functions to which you have access are those appropriate for your role with PrimeroEdge. When you access the **Configuration** menu, you may see a subset of the functions listed above.

Menu Item Categories



Menu Item Categories adds new categories to organize Menu Items, and manages category descriptions. Grouping Menu Items makes it easier and faster to find an item when searching, such as when adding a Menu Item to a Menu or when reviewing Menu Items when assigning a Menu or building a Menu.

Menu Item display order in drop-down lists in the **[Production]** module are also managed through this function.

Menu Item Categories Page

 A screenshot of the 'Menu Item Categories' page. At the top, there is a form titled 'Add New Menu Item Category' with fields for 'Data Source' (set to 'Local'), 'Category Description', and 'Display Order', followed by an 'Add' button. Below this is a table titled 'Menu Item Categories' with columns: 'Description', 'Display Order', 'Data Source', and 'Edit'. The table contains 10 rows of menu item categories. At the bottom, there are navigation buttons (back, first, 1, 2, last, forward) and a 'Page size' dropdown set to '10'. A status bar at the bottom right indicates '18 items in 2 pages'.


Description	Display Order	Data Source	Edit
SC - Bkfst Entree		Local	
SC - Fruit		Local	
SC - Lunch Entree		Local	
SC - Meals	8	State Level	
SC - Milk		Local	
SC - Non Reimbursable	7	State Level	
SC - Salad		Local	
SC - Veg - Green	7	Local	
SC - Veg-O	6	Local	
SC - Whole Grains	9	State Level	

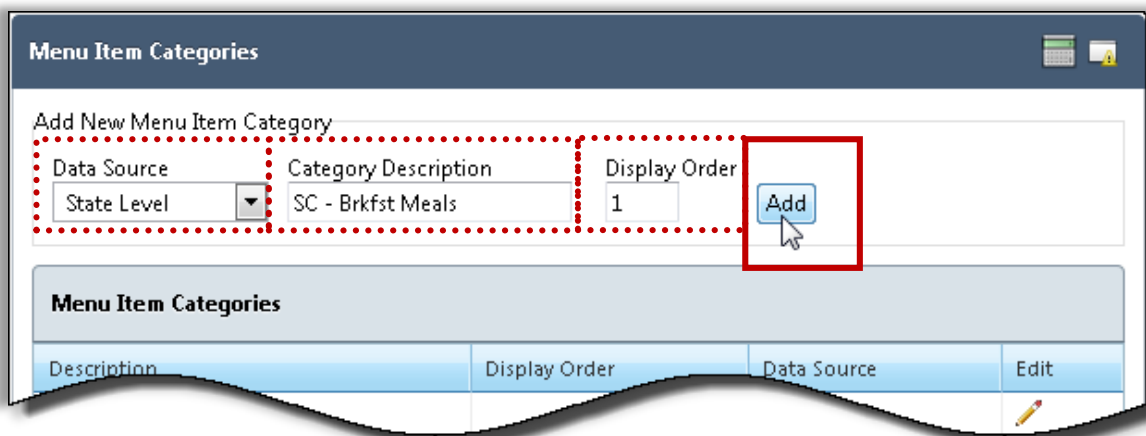
By default on the **Menu Items Categories** page:

- **Data Source** is set to “Local”.
- **Category Description** and **Display Order** are blank (empty).
- All existing menu item categories are shown in the **Menu Item Categories** list.

Adding a Menu Item Category

To add a new Menu Item category

1. Select a **Data Source**, if needed.
2. Enter a brief name or description for the new category in **Category Description**.
3. Enter a number in **Display Order** to represent the placement of the new category in drop-down lists on various **[Production]** module pages.
4. Click .



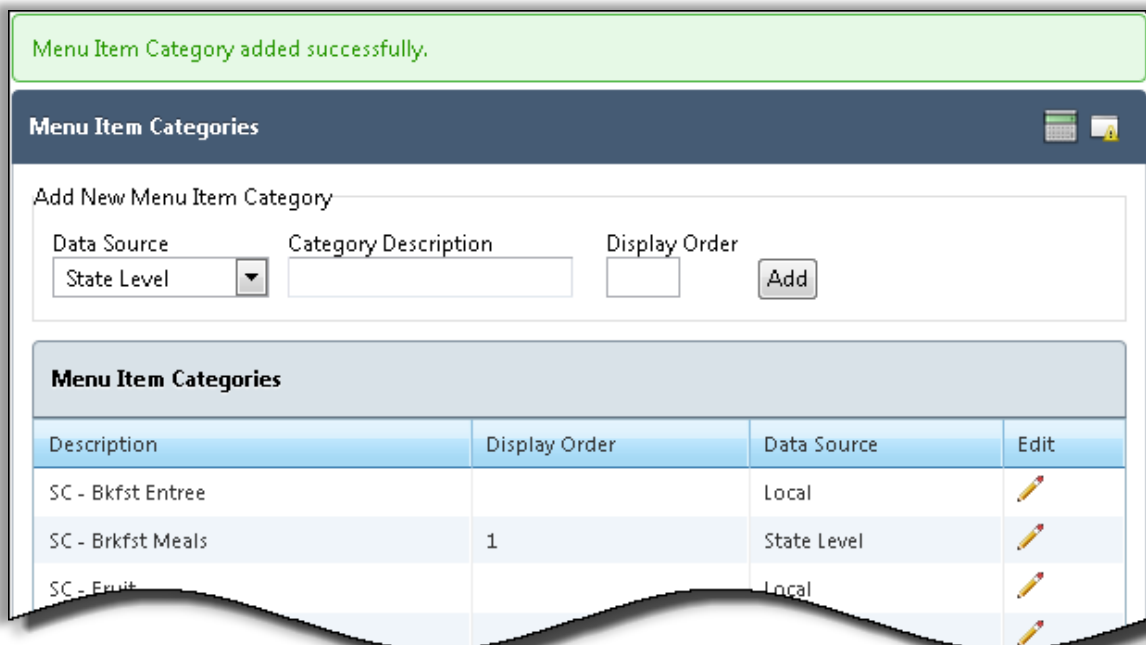
Menu Item Categories

Add New Menu Item Category

Data Source: State Level (dropdown) | Category Description: SC - Brkfst Meals | Display Order: 1 | **Add** (button)

Menu Item Categories

Description	Display Order	Data Source	Edit






Menu Item Category added successfully.

Menu Item Categories

Add New Menu Item Category



Data Source: State Level (dropdown) | Category Description: | Display Order: | **Add** (button)

Menu Item Categories

Description	Display Order	Data Source	Edit
SC - Bkfst Entree		Local	
SC - Brkfst Meals	1	State Level	
SC - Fruit		Local	

Updating Category Details






To update Menu Item Category details

1. Click **Edit** () in a category listing,
2. In the editable category listing, change the Category **Description** text.
3. Enter a new **Display Order** value, if needed.
4. Click **Update** ().






Menu Item Categories

Add New Menu Item Category

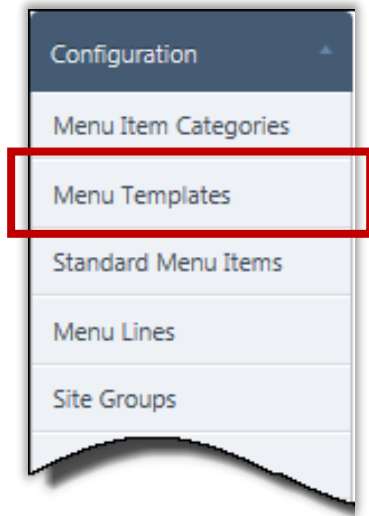
Data Source: Category Description: Display Order:

Description	Display Order	Data Source	Edit
SC - Bkfst Entree		Local	
SC - Brkfst Meals	1	State Level	 
SC - Fruit		Local	
SC - Lunch Entree		Local	

Menu Item Categories

Description	Display Order	Data Source	Edit
SC - Bkfst Entree		Local	
SC - Brkfst Meals	2	State Level	  
SC - Fruit		Local	

Menu Templates



Menu Templates support the creation of menus more quickly. A Menu Template is a base of all Menu details shared by all or most Menus, such as Serving Groups and Menu Items. Rather than performing repetitive actions for each new Menu, a Menu Template allows you to perform the actions once and then make a copy for new Menus.

Menu Templates Page

 A screenshot of the 'Menu Templates' page in a web application. The page has a dark blue header with the title 'Menu Templates'. Below the header is a light blue bar with a link 'Add a new Template'. The main content area contains several filter fields: 'Data Source' (dropdown with '-- ALL --'), 'Meal Pattern' (dropdown with '-- ALL --'), 'Meal Type' (dropdown with '-- ALL --'), and 'Site Group' (dropdown with '-- ALL --'). Below these is a 'Tags' section with a text input 'Enter the tag names separated by a ;' and a 'Name' input field. At the bottom of the filters is a checkbox 'Include Discontinued Templates' and 'Apply' and 'Reset' buttons. Below the filters is a 'Menu List' table.

	Name	Site Group	Meal Type	Meal Pattern	Data Source	
>	Elementary B & L Menu Template	Elementary School	Breakfast, Lunch	[USDA]Meal Pattern SY 2012-2014	State Level	Discontinue
>	Elementary Breakfast Menu Template	Elementary Schools Site Group	Breakfast	[USDA]Meal Pattern SY 2012-2014	State Level	Discontinue
>	HS Breakfast Menu Template	High School	Breakfast	[USDA]Meal Pattern SY 2012-2014	Local	Discontinue
		Middle School			State level2	Discontinue


By default on the **Menu Templates** page:

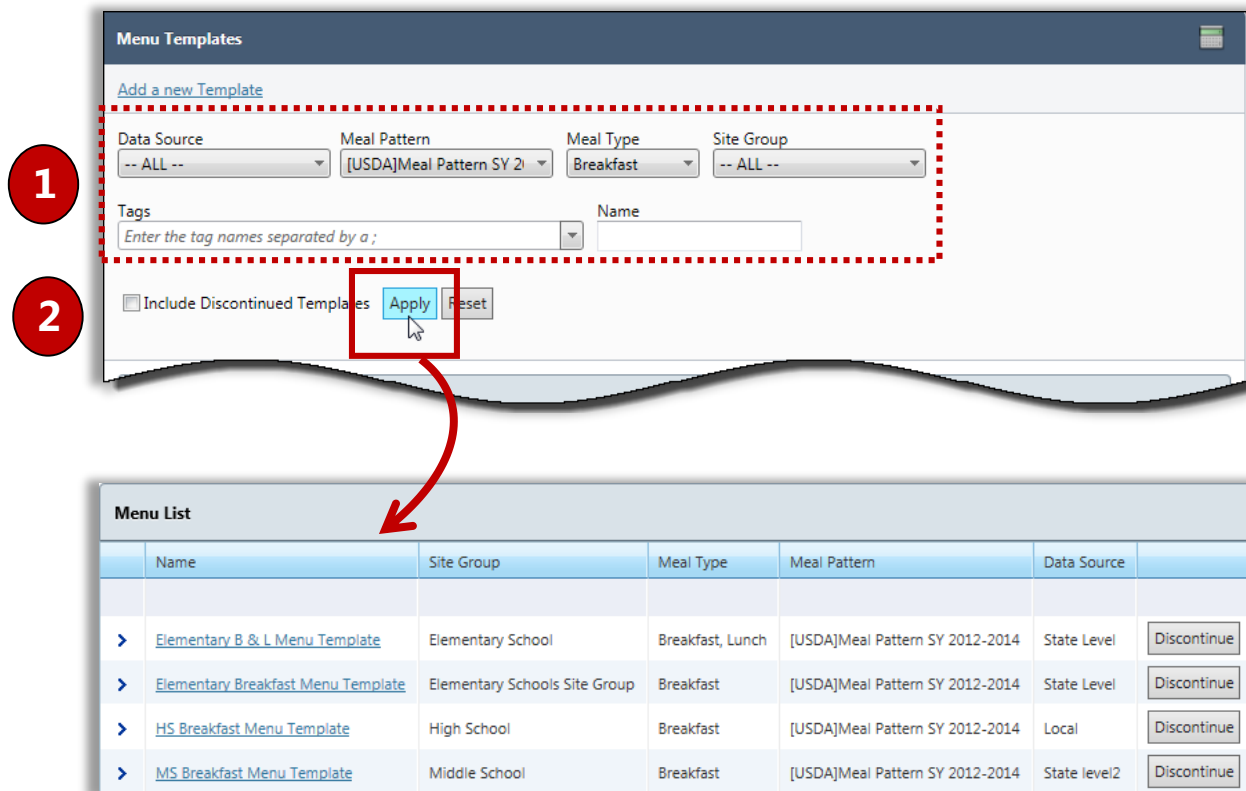
- **Meal Pattern**, **Meal Type**, and **Site Group** are set to “ALL”.
- **Tags** and **Name** are blank (empty).
- **Include Discontinued Templates** is cleared.

Searching for a Menu Template

Six search conditions can be used in any combination to search for a Menu Template.

To search for a Menu Template

1. Enter one or more search conditions.
2. Click  .



Menu Templates



[Add a new Template](#)

1





Data Source: -- ALL -- Meal Pattern: [USDA]Meal Pattern SY 2 Meal Type: Breakfast Site Group: -- ALL --

Tags: Enter the tag names separated by a ; Name:

2

☐ Include Discontinued Templates  



Menu List

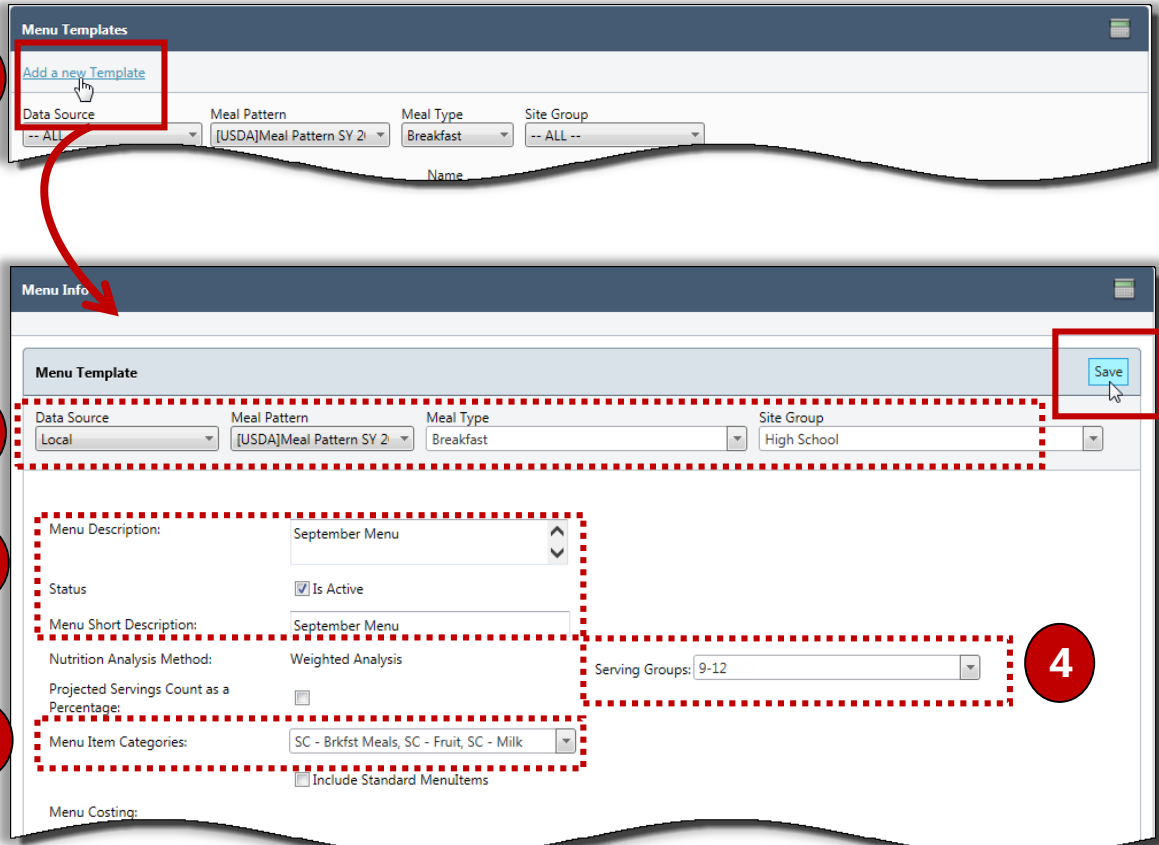
	Name	Site Group	Meal Type	Meal Pattern	Data Source	
>	Elementary B & L Menu Template	Elementary School	Breakfast, Lunch	[USDA]Meal Pattern SY 2012-2014	State Level	
>	Elementary Breakfast Menu Template	Elementary Schools Site Group	Breakfast	[USDA]Meal Pattern SY 2012-2014	State Level	
>	HS Breakfast Menu Template	High School	Breakfast	[USDA]Meal Pattern SY 2012-2014	Local	
>	MS Breakfast Menu Template	Middle School	Breakfast	[USDA]Meal Pattern SY 2012-2014	State level2	

Adding a Menu Template

Adding a Menu Template follows the same basic steps as adding a Menu. However, you add only items that are common to all Menus that will be created with this template.

To add a Menu Template

1. Click the [Add a new Template](#) link.
2. Select a **Meal Type**, and select one or more **Meal Types** and one or more **Site Groups**.
3. Enter a **Menu Description** and a **Menu Short Description**.
4. Select one or more Serving Groups and enter Projected Serving Counts for each group.
5. Select one or more Menu Item Categories and enter the number of choice(s) for each.
6. Click .
7. Add one or more tags.
8. Add a set of Standard Menu Items and/or select individual Menu Items; add Projected Serving Counts for each.
9. Click .



The screenshot shows two forms: 'Menu Templates' and 'Menu Info'. Red callouts 1 through 6 highlight specific steps in the process:

- 1**: Points to the 'Add a new Template' link in the 'Menu Templates' form.
- 2**: Points to the 'Menu Template' section in the 'Menu Info' form, which includes dropdowns for 'Data Source', 'Meal Pattern', 'Meal Type', and 'Site Group'.
- 3**: Points to the 'Menu Description' field in the 'Menu Info' form.
- 4**: Points to the 'Serving Groups' dropdown in the 'Menu Info' form.
- 5**: Points to the 'Menu Item Categories' dropdown in the 'Menu Info' form.
- 6**: Points to the 'Save' button in the top right corner of the 'Menu Info' form.

Menu Template: October Menus

Data Source: Local Meal Pattern: [USDA]Meal Pattern SY 2 Meal Type: Breakfast Site Group: Middle School

Menu Description: October Menu Template

Status: ☒ Is Active

Menu Short Description: October Menus

Nutrition Analysis Method: Weighted Analysis

Projected Servings Count as a Percentage: ☐

Menu Item Categories: SC - Bkfst Meals, SC - Fruit, SC - Milk Serving Groups: 9-12

Menu Costing:

Menu Items

Menu Item	Meal Contribution	9-12 (550)	Edit	Delete
Category: SC - Bkfst				

PrimoEdge - Add Menu Item to Menu

Add Menu Items

Category	Menu Item (Recipe Code)	Serving Size	Meal Contribution	Allergens	Data Source
SC - Bkfst					
<input type="checkbox"/> SC - Bkfst Entree	3.6 oz Precooked Breaded Fish Portions (LR300035)	3 5/8 Ounce			Local
<input type="checkbox"/> SC - Bkfst Entree	Bagel Half; Bake Crafters; Individually Wrapped; as served (LR300043)	1 piece	2 WG		Local
<input type="checkbox"/> SC - Bkfst Entree	Bagel, 100% Whl Wheat, sliced, Fzn, Cooked (LR300049)	1 piece			Local
<input checked="" type="checkbox"/> SC - Bkfst Entree	Bagel, Blueberry Swirl, Sliced, Fzn, Cooked (LR300047)	1 piece			Local
<input type="checkbox"/> SC - Bkfst Entree	Bagel, Cinn Raisin, sliced, fzn, cooked (LR300048)	1 piece			Local
<input type="checkbox"/> SC - Bkfst Entree	Cereal Bar, Apple Cinnamon; Bake Crafters; Individually Wrapped; as served (LR300044)	1 piece			Local
<input checked="" type="checkbox"/> SC - Bkfst Entree	Cereal, Kashi Hot Cereal, Heart to Heart Instant Oatmeal, Raisin Spice,	1 Package	2 WG		Local

Page size: 100

8 items in 1 pages


Menu Template: October Menus

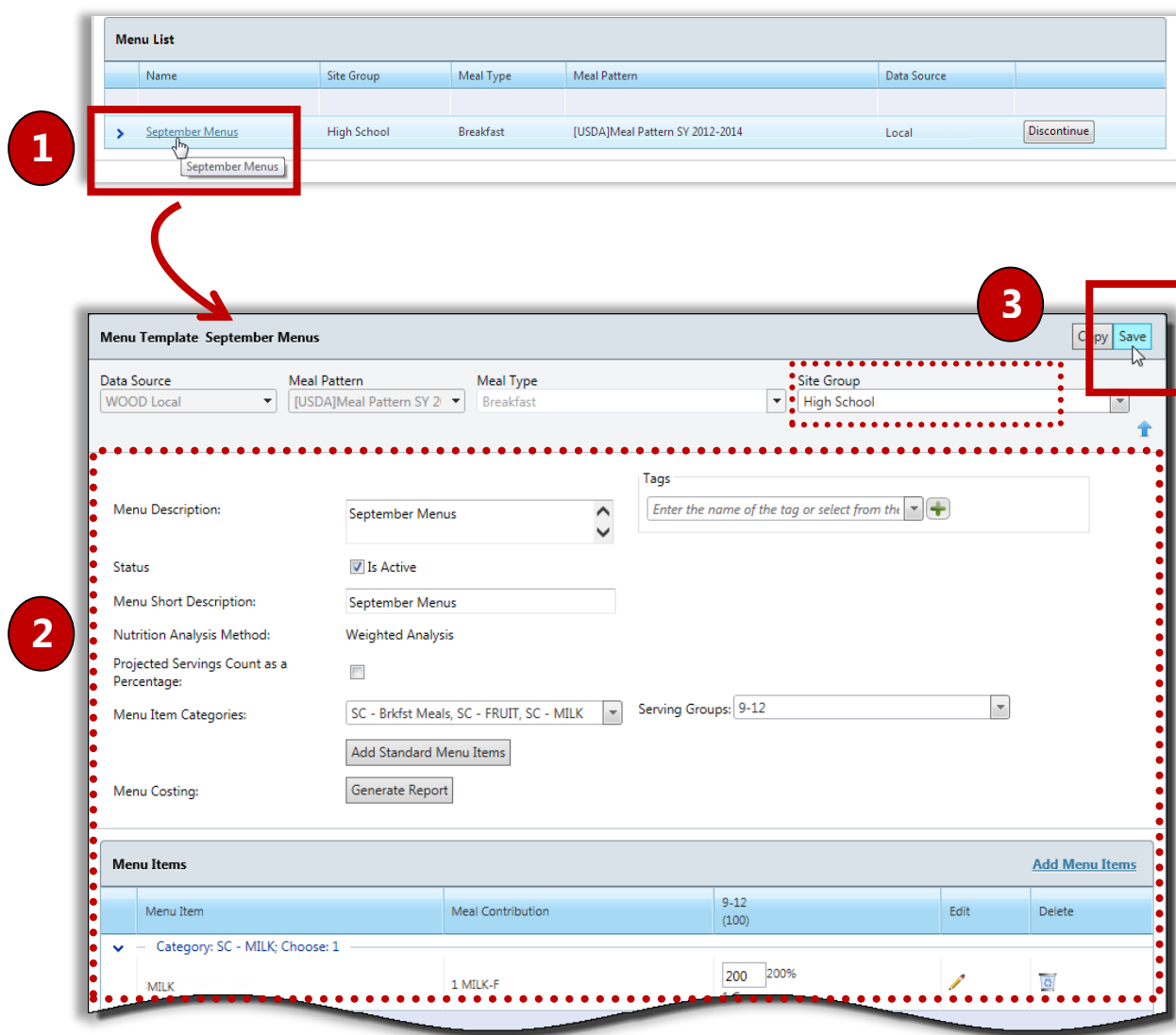
Data Source: Local Meal Pattern: [USDA]Meal Pattern SY 2 Meal Type: Breakfast Site Group: Middle School

Updating a Menu Template

Menu Template details can be changed except for **Meal Pattern** and **Meal Type**.

To update a Menu Template

1. Click the Menu Template [Name](#) link in the **Menu List**.
2. Make changes to **Site Groups**, **Menu Description**, **Tags**, **Serving Groups** and Projected Serving Counts, **Menu Item Categories** and choice(s), and **Menu Items** and Menu Item counts, as needed.
3. Click .



Menu List

Name	Site Group	Meal Type	Meal Pattern	Data Source	
> September Menu	High School	Breakfast	[USDA]Meal Pattern SY 2012-2014	Local	Discontinue

Menu Template: September Menu

Data Source: WOOD Local | Meal Pattern: [USDA]Meal Pattern SY 2 | Meal Type: Breakfast | Site Group: High School

Menu Description: September Menu | Tags: Enter the name of the tag or select from the list

Status: ☒ Is Active

Menu Short Description: September Menu

Nutrition Analysis Method: Weighted Analysis

Projected Servings Count as a Percentage: ☐

Menu Item Categories: SC - Brkfst Meals, SC - FRUIT, SC - MILK | Serving Groups: 9-12

Menu Costing:

Menu Items

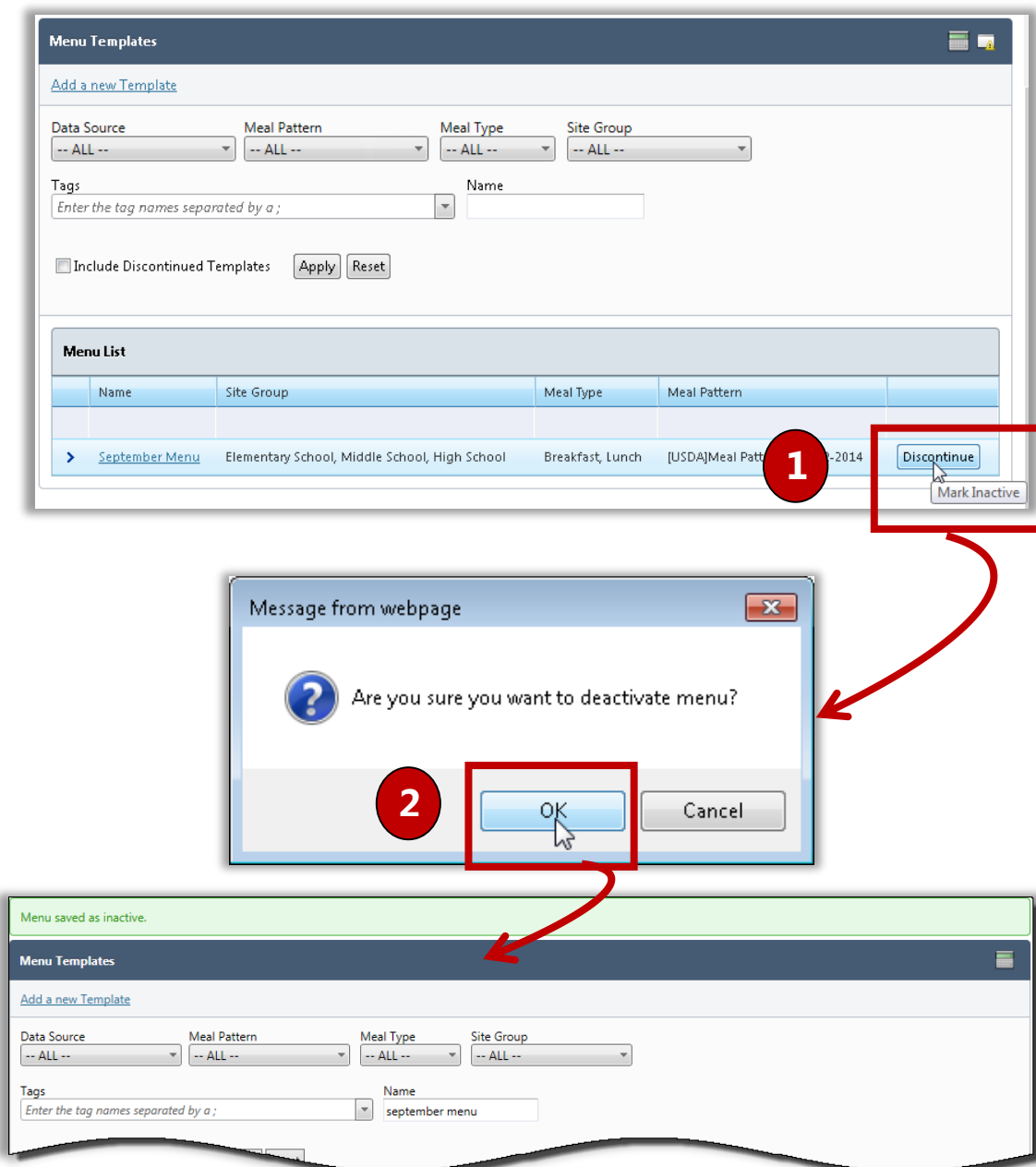
Menu Item	Meal Contribution	9-12 (100)	Edit	Delete
Category: SC - MILK; Choose: 1				
MILK	1 MILK-F	200 200%		

Discontinuing a Menu Template

Menu Templates are never removed. However, a Menu Template can be discontinued or made inactive using one of two procedures. The second method is to clear the **Is Active** option on the **Menu Template** page and save.

To discontinue a Menu Template

1. Click **Discontinue** in a Menu Template listing.
2. Click **OK**.

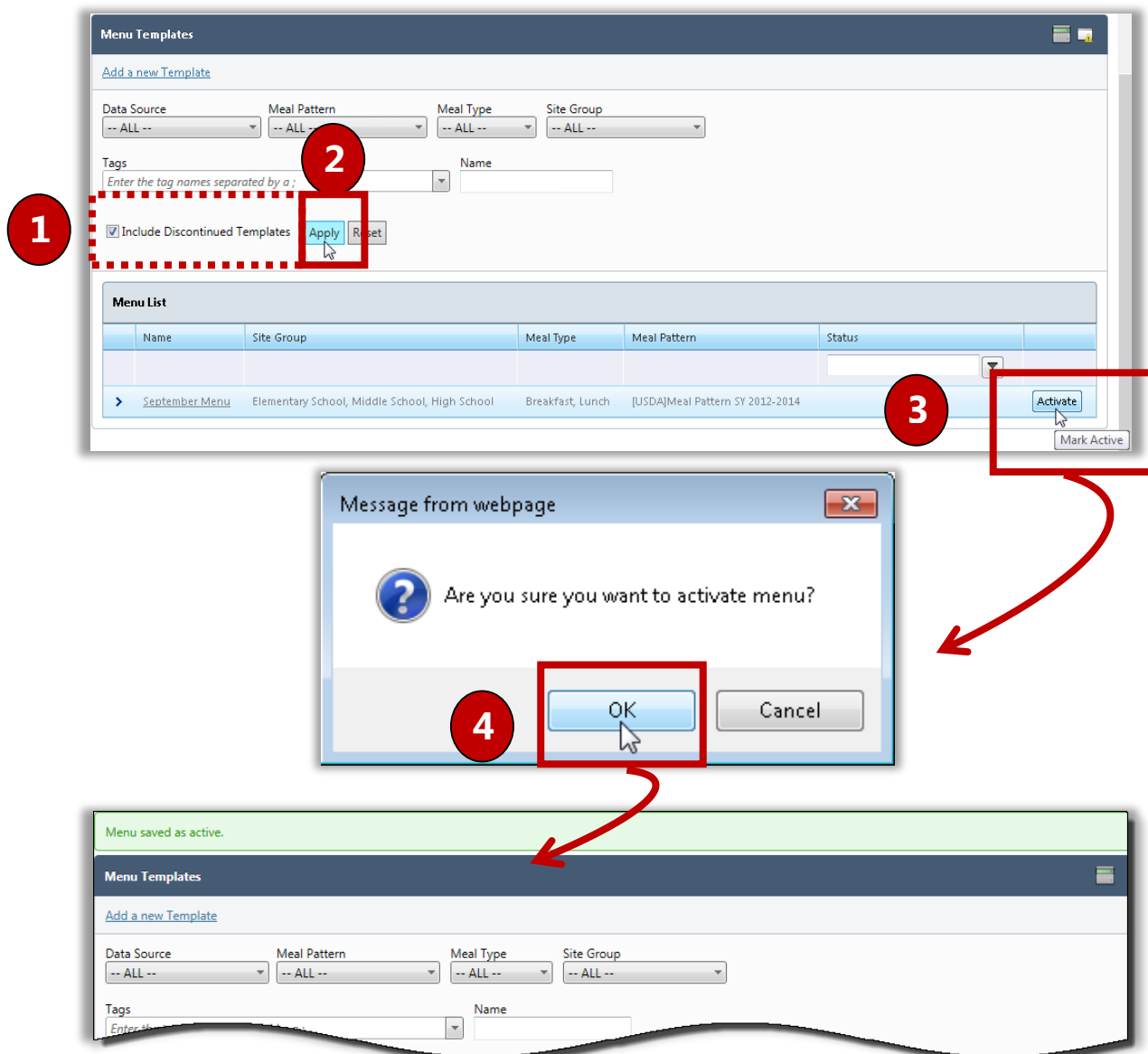


Activate a Discontinued Menu Template

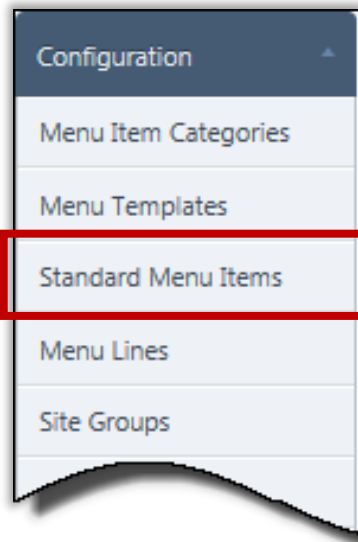
A Menu Template can also be reactivated by selecting the **Is Active** option on the Menu Template page and saving the change.

To activate a discontinued Menu Template

1. Select **Include Discontinued Templates**.
2. Click **Apply**.
3. Click **Activate** in a Menu Template listing in the **Menu List**.
4. Click **OK** in the confirmation message.



Standard Menu Items



Standard Menu Items are those items that are included on many or all Menus, such as milk, fruit, bread, etc. This menu function maintains the list of menu items that are added to a Menu when

Add Standard MenuItems is clicked on the **Menu Info** page.

Adding Standard Menu Items eliminates adding each Menu Item one at a time making the Menu Planner's job quicker and easier.

After adding Standard Menu Items, individual items may be removed from the menu as needed.

Standard Menu Items Page

The screenshot shows the 'Standard Menu Items' page. It features two main sections:

Choose Menu Items

<input type="checkbox"/>	Menu Item	Recipe	Category	Allergens	Data Source
<input type="checkbox"/>	100 cal 5% sat fat	LR300057	Meals		Local
<input type="checkbox"/>	118603 with cost	LR100372	Extra		Local
<input type="checkbox"/>	123 Rolls	LR100264	Meals	Contains Milk, Tree nuts	Local
<input type="checkbox"/>	1234 Rolls	LR300050	Meals	Contains Milk, Tree nuts	Local
<input type="checkbox"/>	160 Slice White Pasteurized Process American Chees	LR124003	Meals		Local
<input type="checkbox"/>	200 cal 9% sat fat	LR300058	Meals		Local

Page size: 6 223 items in 38 pages

Standard Menu Items

Menu Item	Projected Servings	Added By	Added On	Modified By	Modified On	Delete
Bottled Spring Water-w/cost	687	Cybersoft Support	6/8/2012 3:04 PM	Cybersoft Support	6/8/2012 3:24 PM	<input type="checkbox"/>
Cheese 'n Crackers	2,000	Cybersoft Support	10/12/2011 1:24 PM	Cybersoft Support	6/8/2012 3:24 PM	<input type="checkbox"/>

By default on the **Standard Menu Items** page:

- All existing menu items are listed in the **Choose Menu Items** group.
- All current Standard Menu Items are listed in the **Standard Menu Items** group.

Adding a Standard Menu Item

To add a Standard Menu Item

1. Select one or more items in the **Choose Menu Items** list; use the filters in each column to narrow the display of menu items.
2. Click **Add**.
3. Enter the Projected Serving Counts for each added Menu Item.
4. Click **Save**.

Standard Menu Items

Choose Menu items

2 Add

Menu Item	Recipe	Category	Allergens	Data Source
<input type="checkbox"/> 160 Slice Yellow Reduced Sodium Reduced Fat Pasteu	SR102644	Entrees		PDE Shared
<input type="checkbox"/> Apple Juice, Canned or Bottled, Unsweetened, with	SR103762	Fruits		PDE Shared
<input checked="" type="checkbox"/> Apple Sauce, Single Serve Cup, Loose Pack Cases, K	SR100701	Fruits		PDE Shared

1

Standard Menu Items

Menu Item	Projected Servings	Added By	Added On	Modified By	Modified On	Delete
Apple Sauce, Single Serve Cup, Loose Pack Cases, K	3 100	Cybersoft Support	7/21/2013 10:59 AM			

4 Save

Standard Menu Item saved successfully.

Standard Menu Items


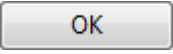
Choose Menu items

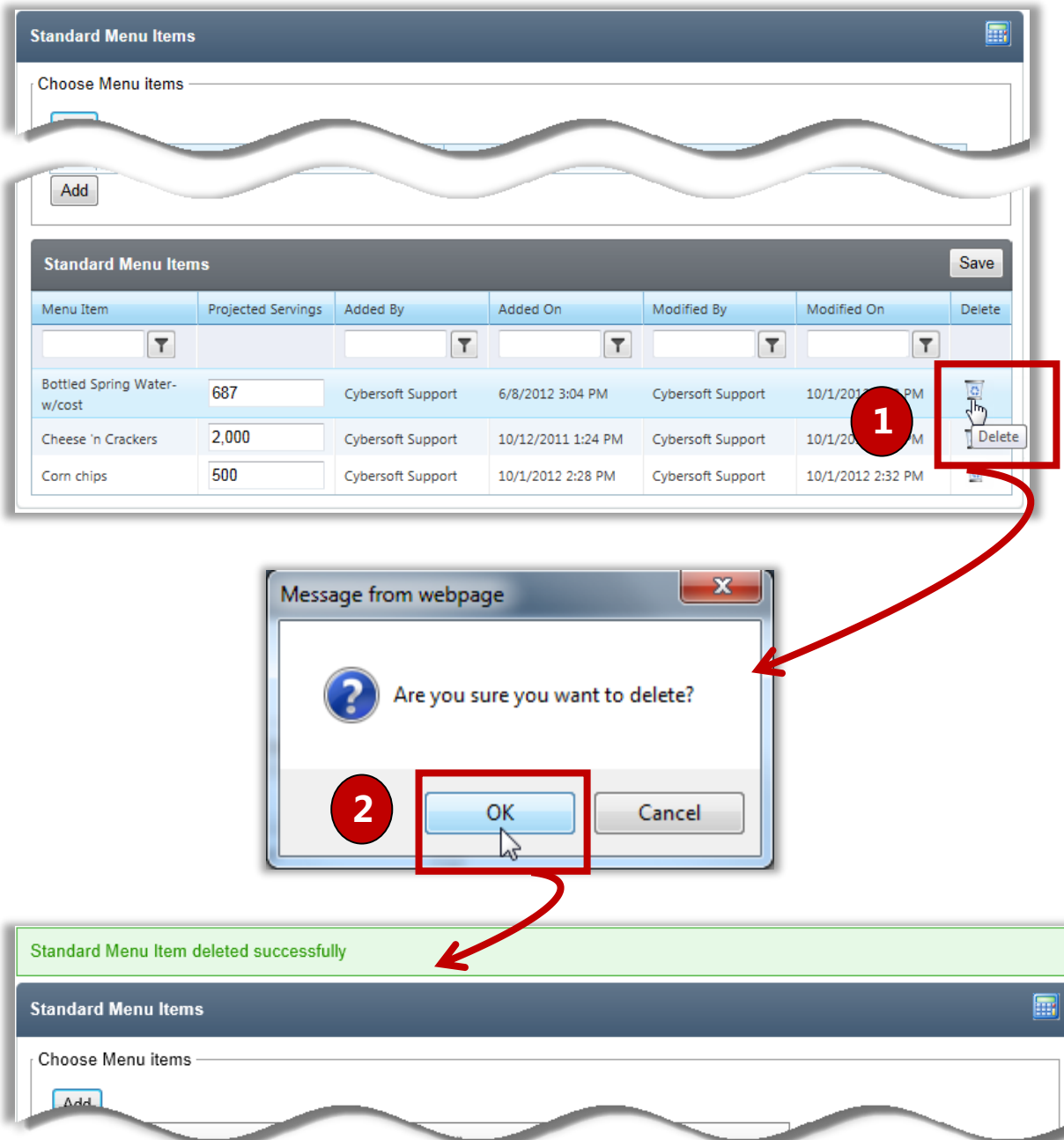
Add

Menu Item	Recipe	Category	Allergens	Data Source
<input type="checkbox"/> 160 Slice Yellow Reduced Sodium Reduced Fat Pasteu	SR102644	Entrees		PDE Shared
<input type="checkbox"/> Apple Juice, Canned or Bottled, Unsweetened, with	SR103762	Fruits		PDE Shared
<input checked="" type="checkbox"/> Apple Sauce, Single Serve Cup, Loose Pack Cases, K	SR100701	Fruits		PDE Shared

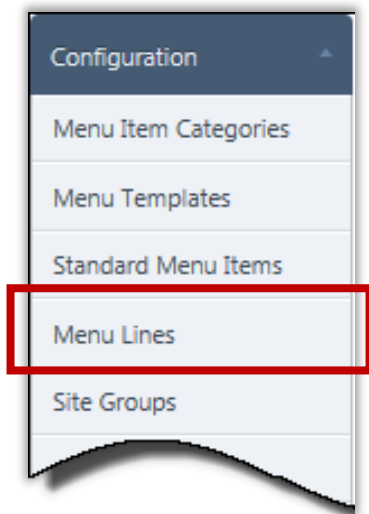
Deleting a Standard Menu Item

To remove a Standard Menu Item

1. Click **Delete** () in a Standard Menu Item listing.
2. Click  .



Menu Lines



Menu Lines adds menu lines and updates menu line descriptions. Menu Lines are created when different production records are needed for the same meal type.

Menu Lines are often created around a theme. For example, a Regular Breakfast Menu Line could be one served in the cafeteria and the Classroom Breakfast Menu Line could be served in a classroom. Both menu lines are for the breakfast meal type but serve different items.

Menu Lines are used when creating and assigning Menus, Menu Cycles, Menu Templates and configuring sites.

Menu Lines cannot be removed; a **Menu Line Description** can be changed as often as necessary.

Menu Lines Page

 A screenshot of the 'Menu Lines' page in a software application. The page has a dark blue header with the title 'Menu Lines'. Below the header, there is a section for 'Add New Menu Line' which includes a text input field for 'Menu Line Description' and an 'Add' button. Below this is a section titled 'Existing Menu Lines' which contains a table. The table has two columns: 'Description' and 'Edit'. The 'Edit' column contains a pencil icon for each row. The rows in the table are: Regular, Breakfast - In Class, Salad Bar, Pizza Bar, OLE Taco Bar, Hot Sandwich Bar, and Smoothie Bar.


Description	Edit
Regular	
Breakfast - In Class	
Salad Bar	
Pizza Bar	
OLE Taco Bar	
Hot Sandwich Bar	
Smoothie Bar	

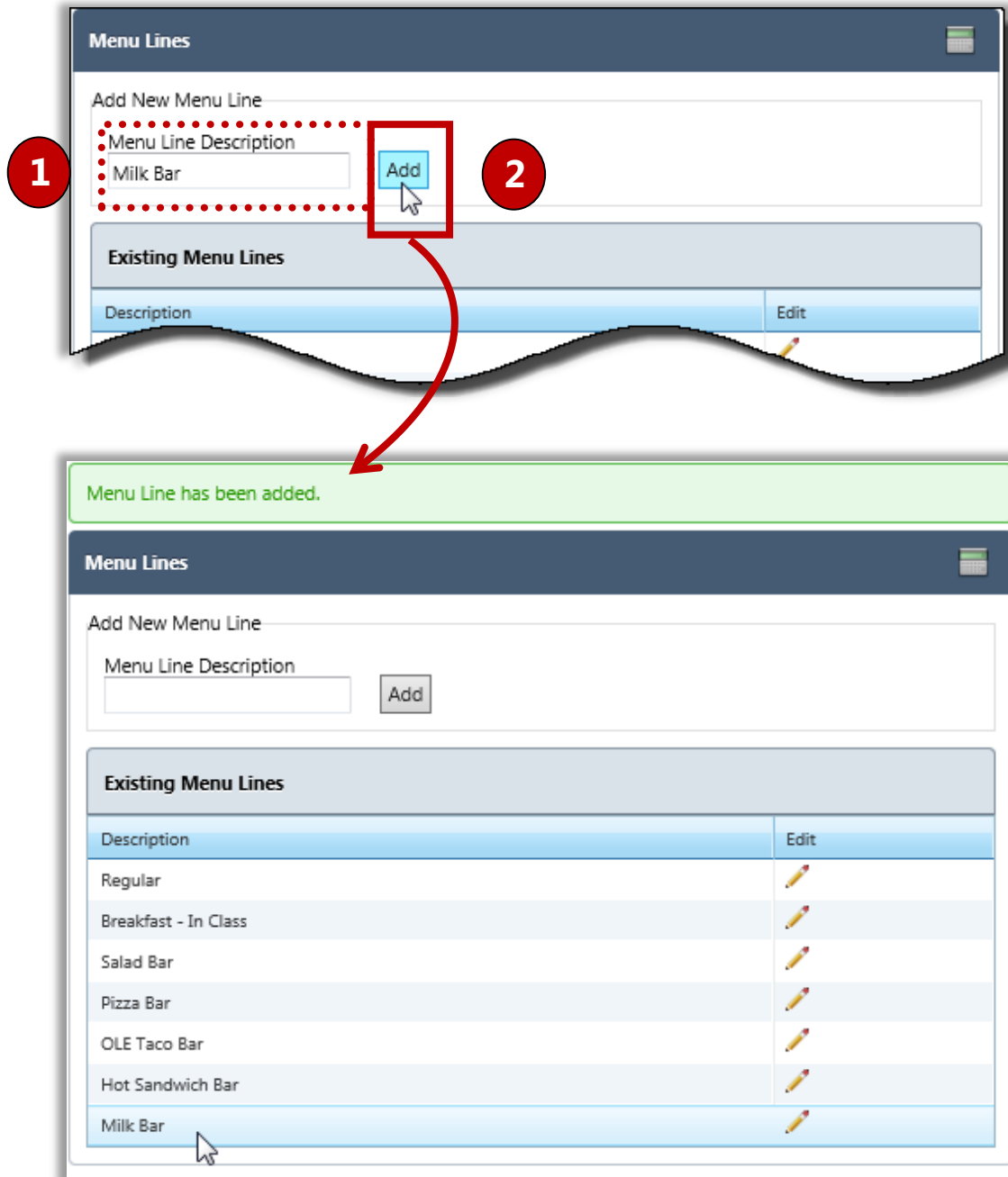
By default on the **Menu Lines** page:

- **Menu Line Description** is blank.
- Existing Menu Lines are shown in the **Existing Menu Lines** list.

Adding a Menu Line



To add a Menu Line

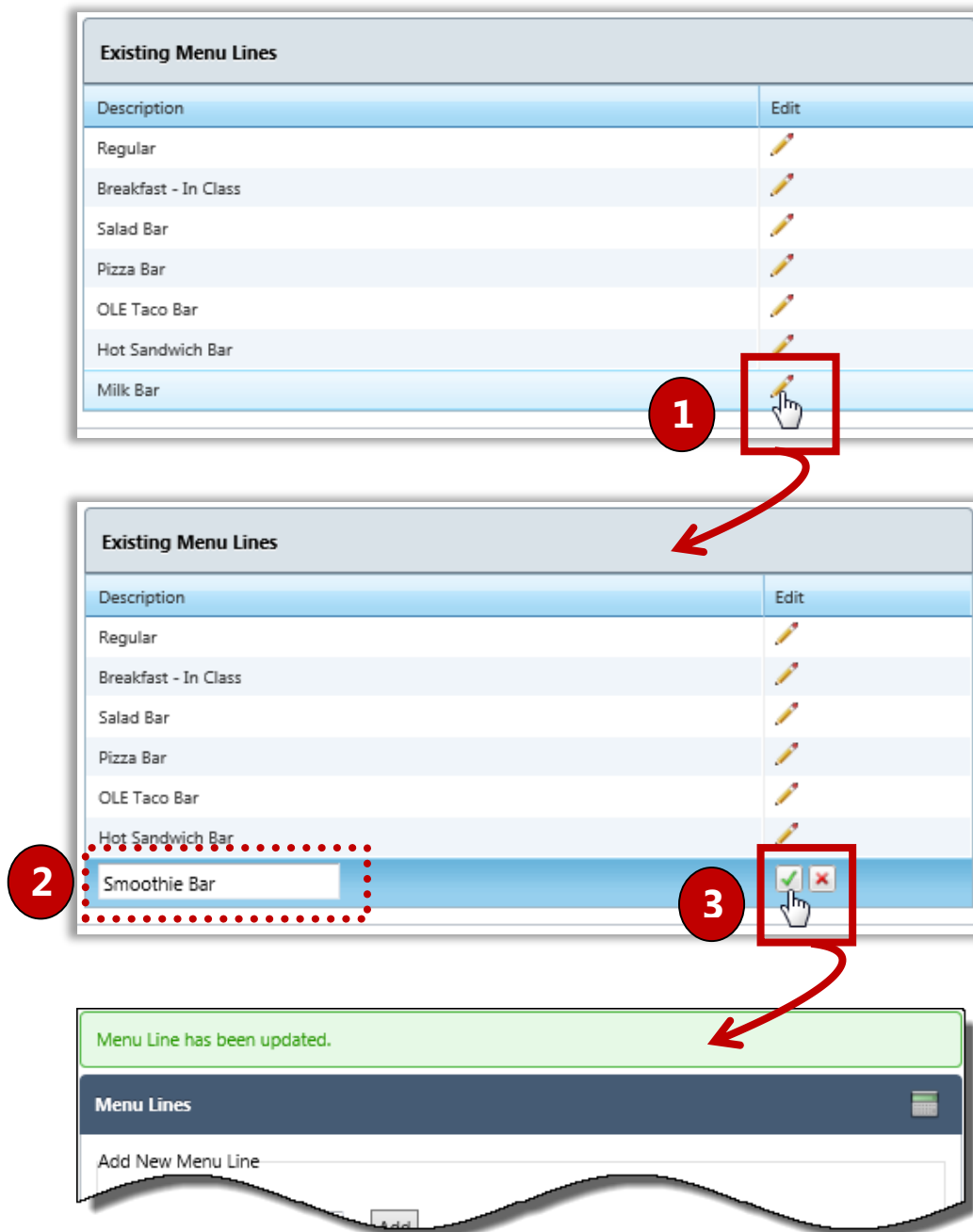
1. Enter a name for the new menu line in **Menu Line Description**.
2. Click  .



Updating a Menu Line Description

To update a Menu Line description

1. Click **Edit** () in a menu listing.
2. Change the text in **Menu Line Description** as needed.
3. Click **Update** ().



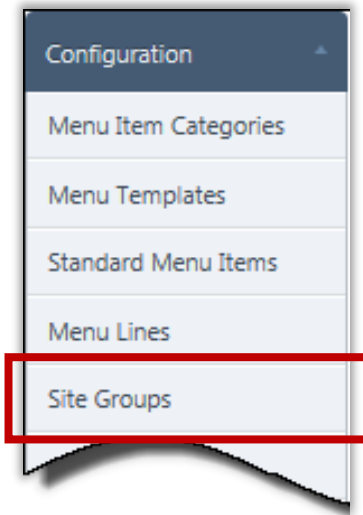
The visual guide consists of three screenshots illustrating the steps to update a menu line description.

Step 1: The first screenshot shows a table titled "Existing Menu Lines" with columns "Description" and "Edit". The "Edit" column contains pencil icons for each menu line. A red circle with the number "1" is next to the "Milk Bar" row, and a red box highlights the pencil icon in the "Edit" column for that row.

Step 2: The second screenshot shows the same table. The "Milk Bar" row is highlighted with a red dotted border, and a red circle with the number "2" is next to it. The "Description" field for this row now contains the text "Smoothie Bar". A red box highlights the "Update" icon (a checkmark) in the "Edit" column for this row.

Step 3: The third screenshot shows a green message bar at the top stating "Menu Line has been updated." Below this, there is a section titled "Menu Lines" with a text input field labeled "Add New Menu Line" and an "Add" button.

Site Groups



Site Groups organizes feeding sites into groups to make creating and assigning Menus easier and quicker. Creating a Site Group is as simple as clicking one button to automatically place all sites into a group according to the assigned Site Code. Or, you can create local (custom) groups and individually add sites to the groups.

Site Groups are used when creating Menus and Menu Cycles, and when Assigning Menus.

A Site Group can be removed until a site is assigned to the group. When a Site is assigned to a Site Group the **Delete** icon

() no longer appears in the **Delete** column in the Site Group listing..

Site Groups Page

 A screenshot of the 'Site Groups' page in a web application. At the top, there's a header 'Site Groups' and a note: 'Please note that changing the site's group or effective and end dates will affect the site's menus starting tomorrow or the effective date (whichever is later.) Production plans may be lost where the menu is changed.' Below the note are two dropdown menus: 'Site Code' with '-- ALL --' and 'Site' with '-- ALL --'. The main content area is titled 'Site Groups' and contains a table. Above the table are buttons for '+ Add new record' and 'Refresh'. The table has columns: Description, DataSource, Added By, Added On, Modified By, Modified On, Edit, and Delete. There are three rows of data, each with a blue expand/collapse icon in the first column.

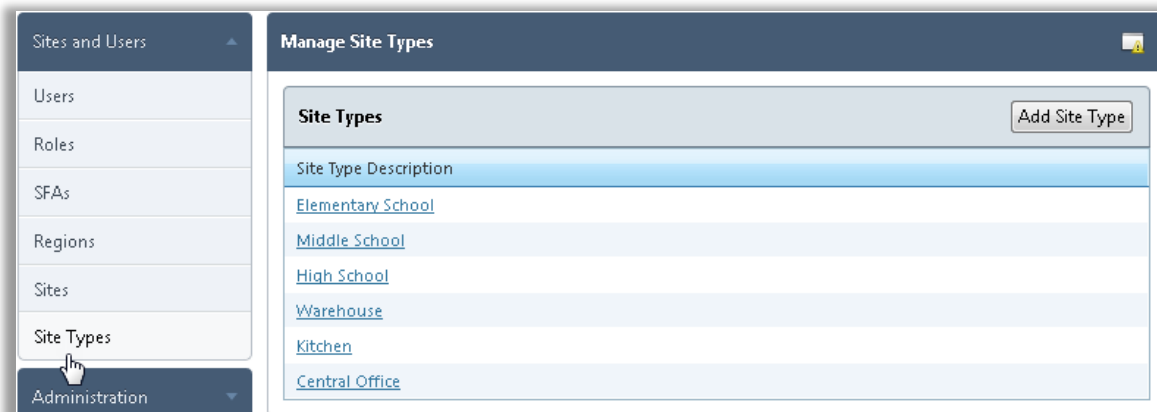
	Description	DataSource	Added By	Added On	Modified By	Modified On	Edit	Delete
>	Elementary School	Local	Cybersoft Support	07/17/2012				
>	High School	Local	Cybersoft Support	07/17/2012				
>	Middle School	Local	Cybersoft Support	07/17/2012				

By default on the **Site Groups** page:

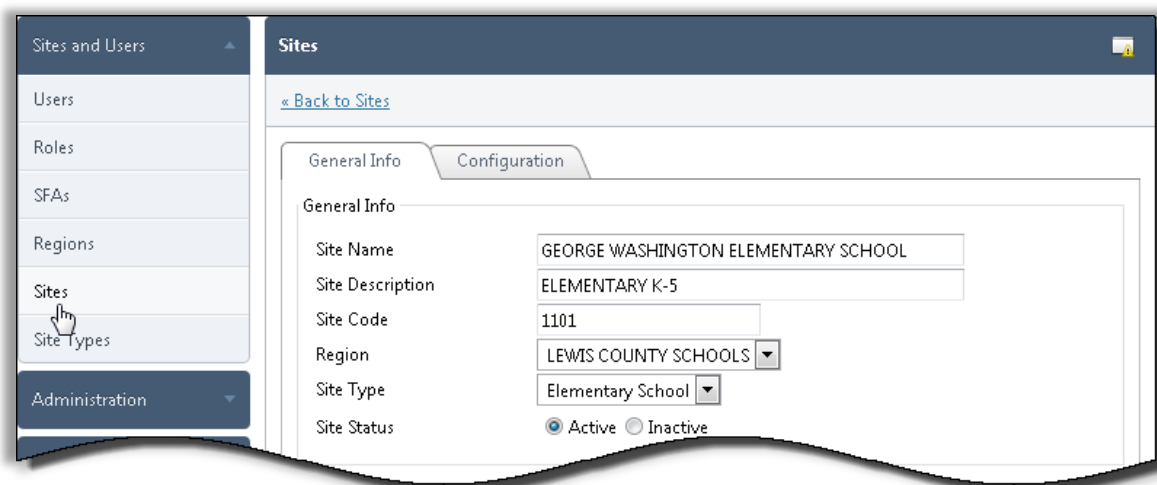
- All existing site groups are listed.
- Site group details are hidden.

Adding Site Groups by Site Type

The quick way to create Site Groups and assign Sites to a group is to use “**Add Site types as groups.**” One Site Group is automatically created for each Site Type listed on the **Manage Site Types** page in **[System] > Sites and Users > Site Types**. An example is shown below.



Each Site is then automatically assigned to a Site Group according to the Site Type selected for the Site on the **General** tab of the **Sites** page in **[System] > Sites and Users > Sites**. An example is shown below.



To create Site Groups for all Site Types

1. Click **Add Site types as groups**.

Site Groups

Please note that changing the site's group or effective and end dates will affect the site's menus starting tomorrow or the effective date (whichever is later.) Production plans may be lost where the menu is changed.

Site Code: -- ALL -- Site: -- ALL --

Add Site types as groups

Site Groups

+ Add new record Refresh

Description	Added By	Added On	Modified By	Modified On	Edit	Delete
No records to display.						

Site Groups

Please note that changing the site's group or effective and end dates will affect the site's menus starting tomorrow or the effective date (whichever is later.) Production plans may be lost where the menu is changed.

Site Code: -- ALL -- Site: -- ALL --

Add Site types as groups

Site Groups

+ Add new record Refresh

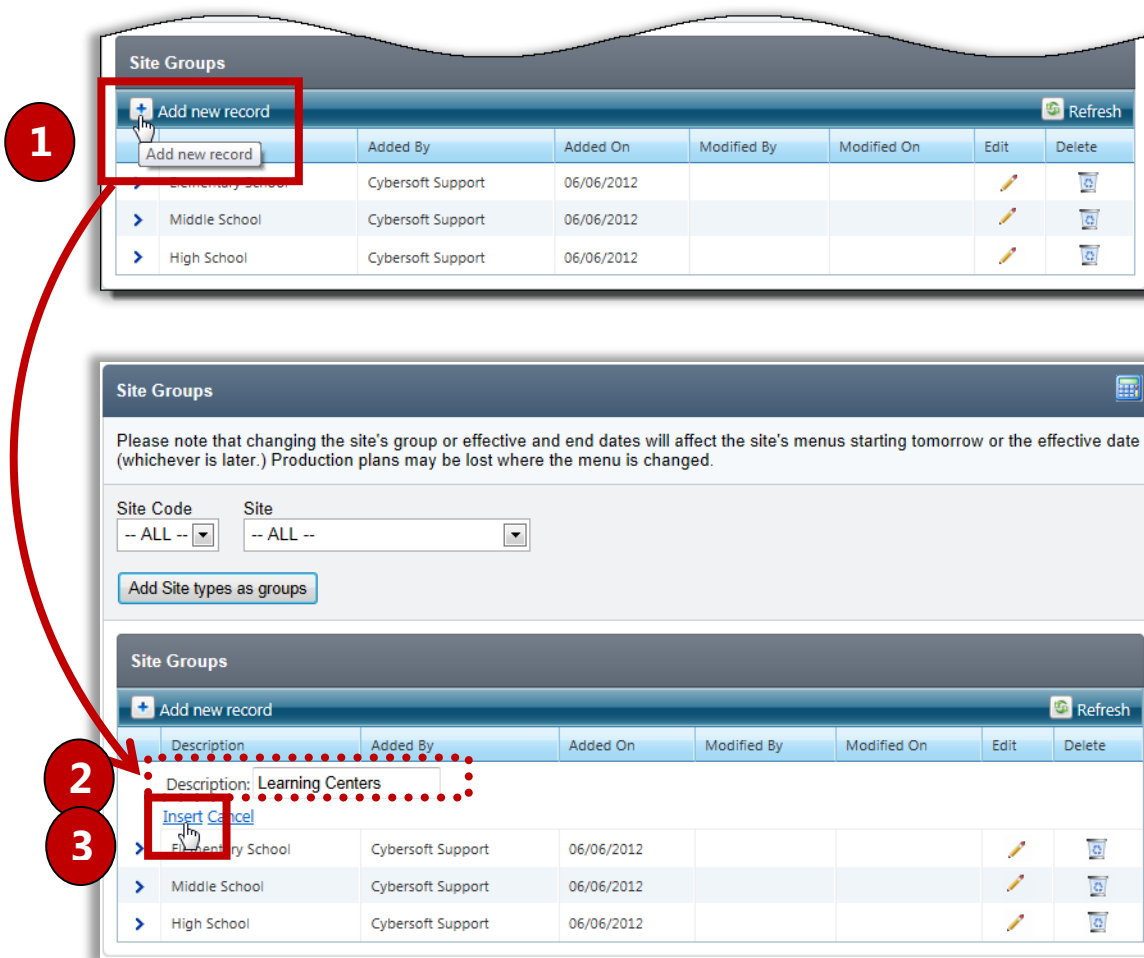
Description	Added By	Added On	Modified By	Modified On	Edit	Delete
> Elementary School	Cybersoft Support	06/06/2012				
> Middle School	Cybersoft Support	06/06/2012				
> High School	Cybersoft Support	06/06/2012				

Adding a Site Group

Adding a custom Site Group allows you to create a group name of your choice. Individual Sites are then added to the Site Group.

To add an individual Site Group

1. Click .
2. Enter a name for the Site Group in **Description**.
3. Click [Insert](#).



Site Groups

Refresh

	Description	Added By	Added On	Modified By	Modified On	Edit	Delete
>	Elementary School	Cybersoft Support	06/06/2012				
>	Middle School	Cybersoft Support	06/06/2012				
>	High School	Cybersoft Support	06/06/2012				

Please note that changing the site's group or effective and end dates will affect the site's menus starting tomorrow or the effective date (whichever is later.) Production plans may be lost where the menu is changed.

Site Code: -- ALL -- Site: -- ALL --

Add Site types as groups

Site Groups



Refresh

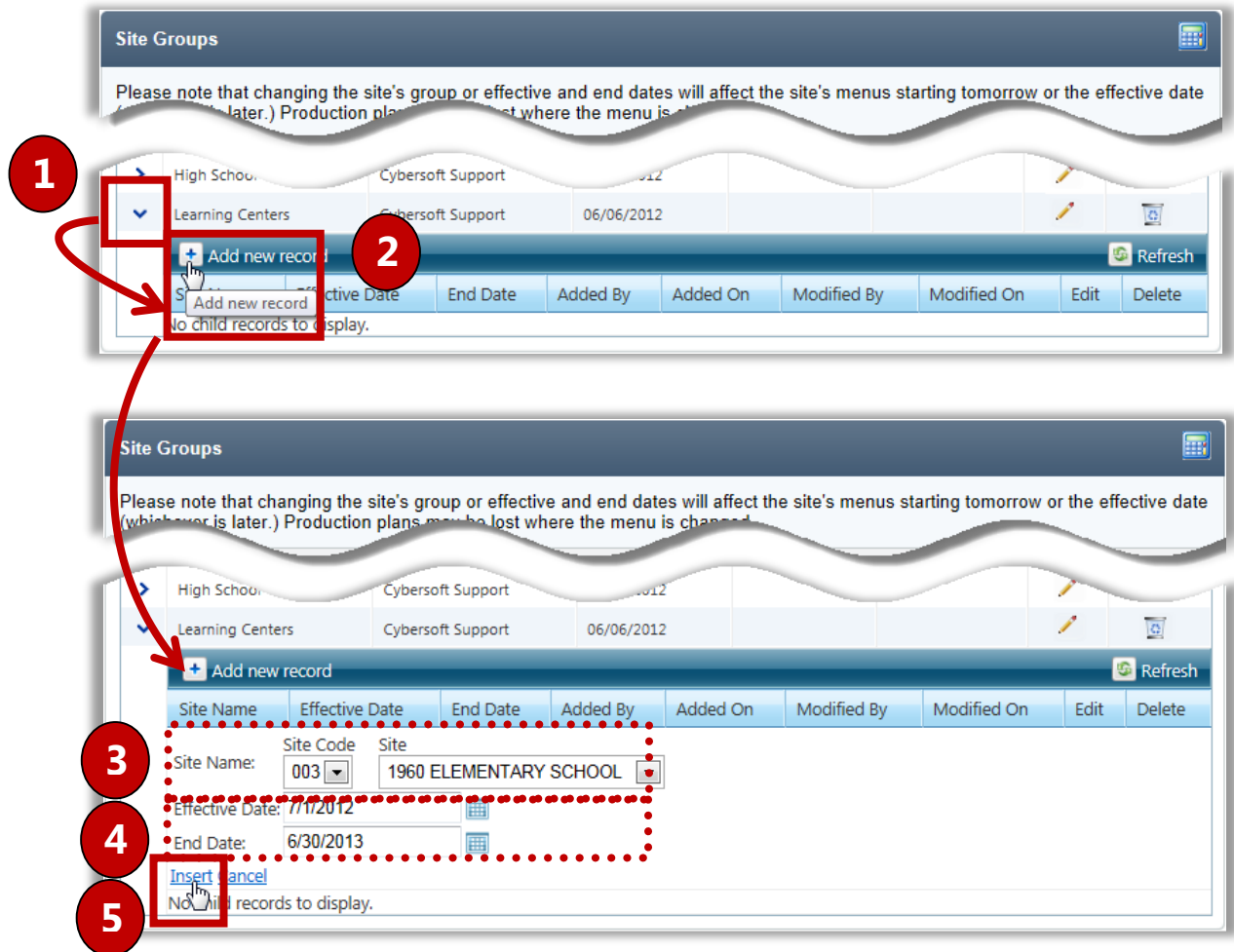
	Description	Added By	Added On	Modified By	Modified On	Edit	Delete
	Description: Learning Centers						
>	Elementary School	Cybersoft Support	06/06/2012				
>	Middle School	Cybersoft Support	06/06/2012				
>	High School	Cybersoft Support	06/06/2012				

Adding a Site to a Site Group

After creating a custom Site Group, individual Sites are added one at a time. As many sites as are needed can be added to the group.

To add a Site to a Site Group

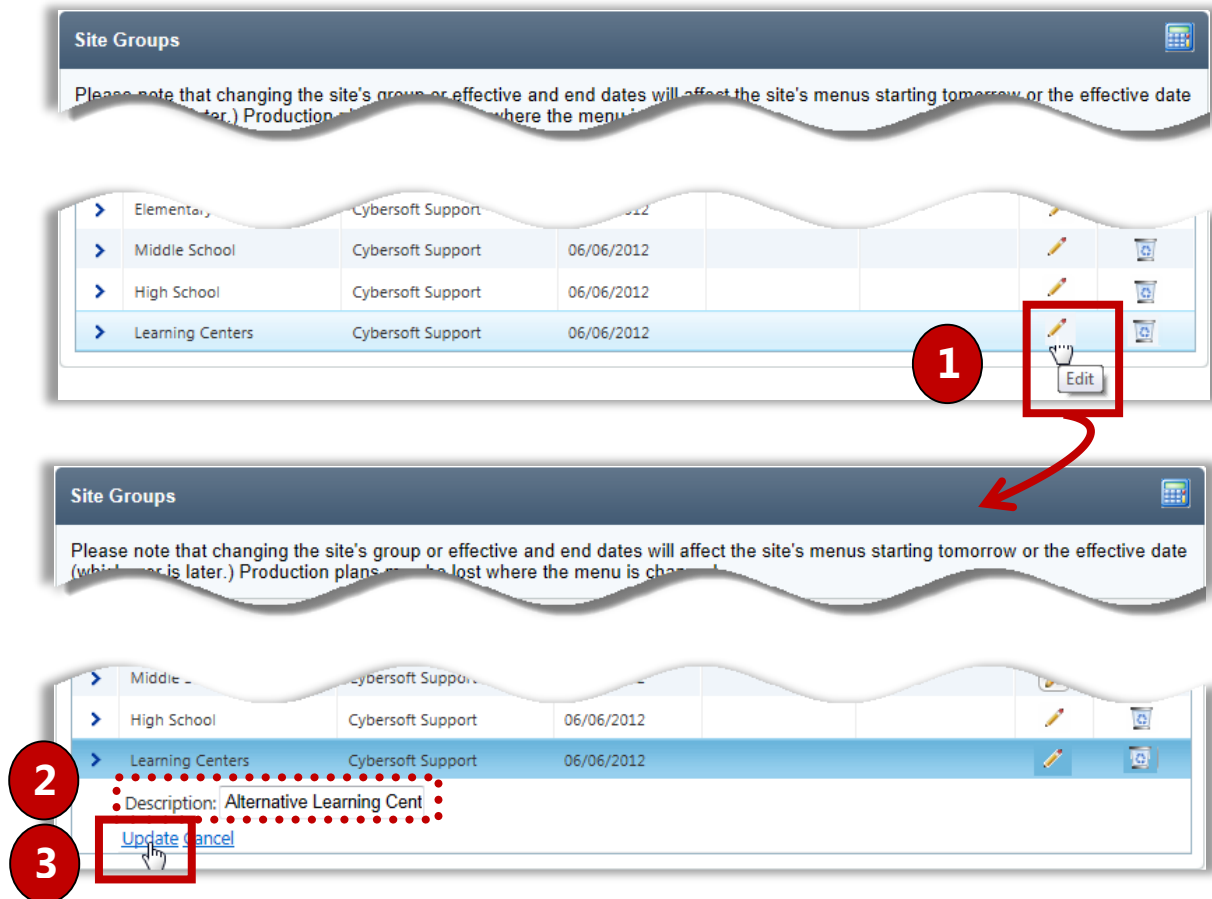
1. Click **Show** () in a Site Group listing.
2. Click  .
3. Select a **Site Code** or **Site**.
4. Enter a service start date in **Effective Date** and a service end date in **End Date**.
5. Click **Insert**.



Updating Site Group Details

To update Site Group details

1. Click **Edit** () in a Site Group listing.
2. Make changes in **Description**, as needed.
3. Click [Update](#).



Site Groups

Please note that changing the site's group or effective and end dates will affect the site's menus starting tomorrow or the effective date (whichever is later.) Production plans may be lost where the menu is changed.

>	Elementary	Cybersoft Support	06/06/2012				
>	Middle School	Cybersoft Support	06/06/2012				
>	High School	Cybersoft Support	06/06/2012				
>	Learning Centers	Cybersoft Support	06/06/2012				

1 Edit

Site Groups

Please note that changing the site's group or effective and end dates will affect the site's menus starting tomorrow or the effective date (whichever is later.) Production plans may be lost where the menu is changed.

>	Middle School	Cybersoft Support	06/06/2012				
>	High School	Cybersoft Support	06/06/2012				
>	Learning Centers	Cybersoft Support	06/06/2012				



2 Description: Alternative Learning Cent

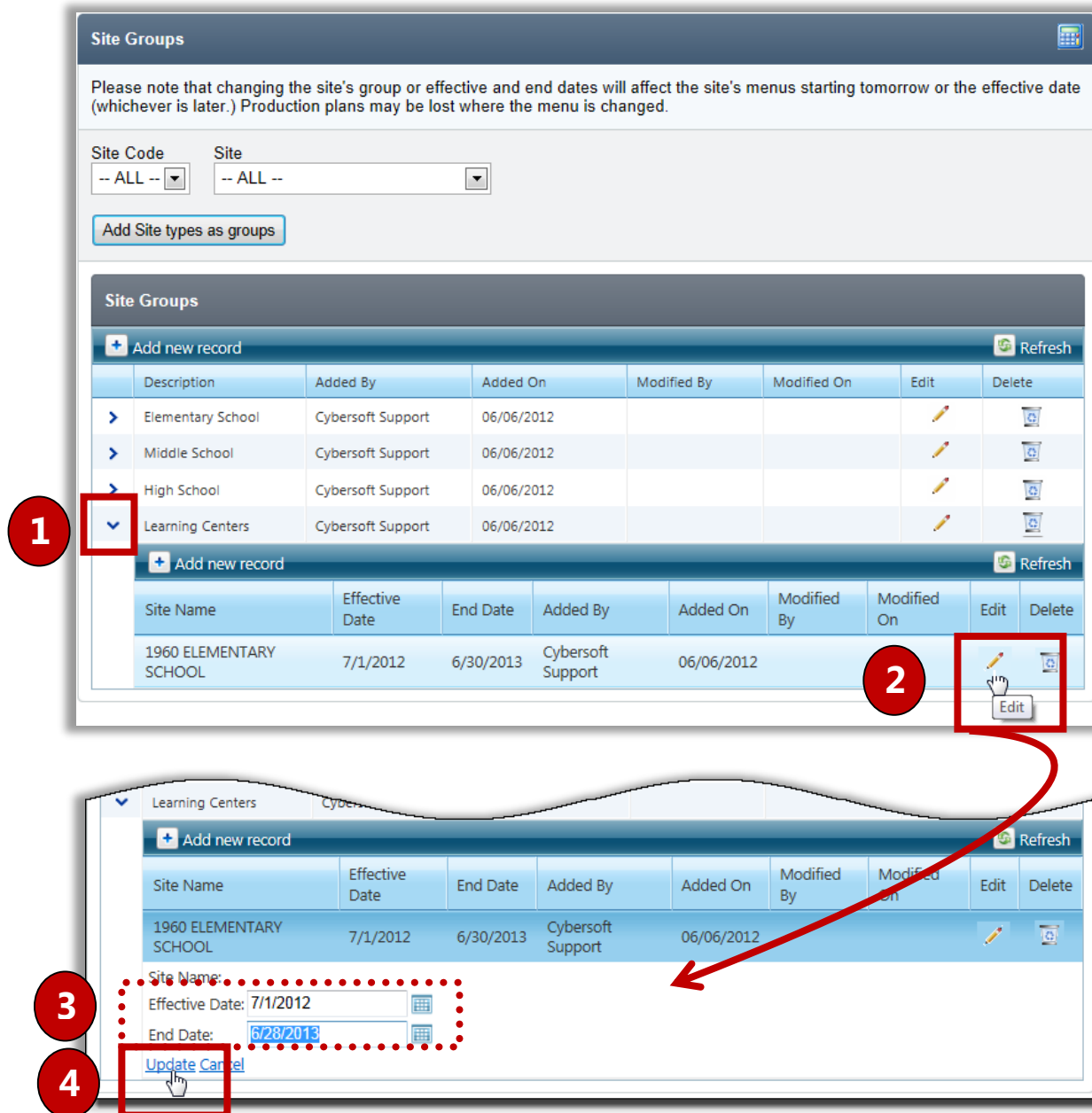
3 Update Cancel

Updating Site Details

Changing Site information selects a new date when feeding begins or ends.

To change Site details

1. Click **Expand** () in a Site Group listing.
2. Click **Edit** () in a Site listing.
3. Enter or select a new **Effective Date** (Start Date) or **End Date**.
4. Click **Update**.



Site Groups

Please note that changing the site's group or effective and end dates will affect the site's menus starting tomorrow or the effective date (whichever is later.) Production plans may be lost where the menu is changed.

Site Code: -- ALL -- Site: -- ALL --

[Add Site types as groups](#)

Description	Added By	Added On	Modified By	Modified On	Edit	Delete
> Elementary School	Cybersoft Support	06/06/2012				
> Middle School	Cybersoft Support	06/06/2012				
> High School	Cybersoft Support	06/06/2012				
> Learning Centers	Cybersoft Support	06/06/2012				

1960 ELEMENTARY SCHOOL

Site Name	Effective Date	End Date	Added By	Added On	Modified By	Modified On	Edit	Delete
1960 ELEMENTARY SCHOOL	7/1/2012	6/30/2013	Cybersoft Support	06/06/2012				

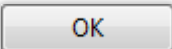
2

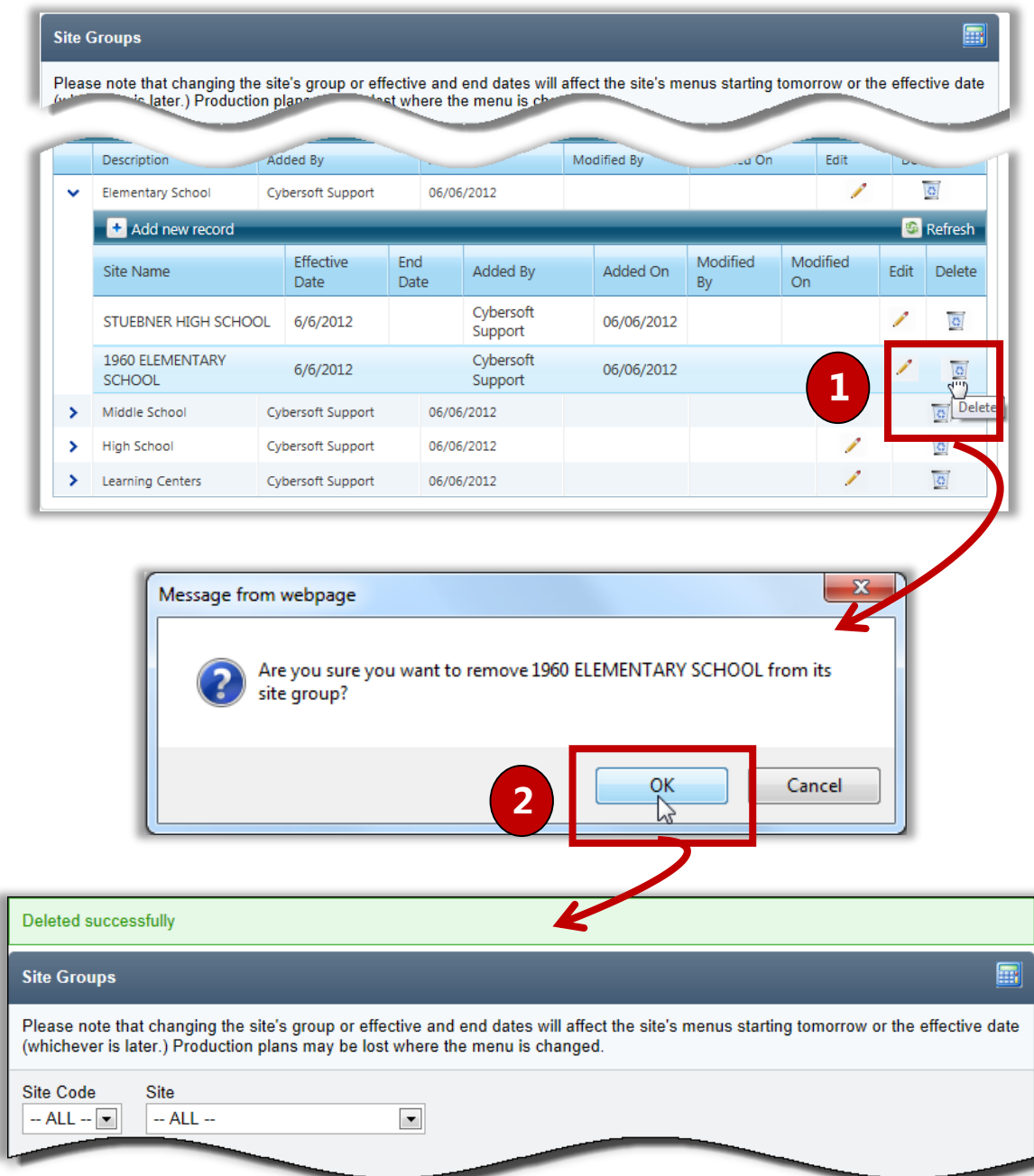
3 Site Name: Effective Date: 7/1/2012 End Date: 6/28/2013

4 [Update](#) [Cancel](#)

Deleting a Site in a Site Group

To delete a Site from a Site Group

1. Expand a Site Group.
2. Click **Delete** () in a site listing.
3. Click  .




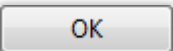
The screenshot illustrates the process of deleting a site from a site group in the PrimeroEdge application. It is divided into three main sections:

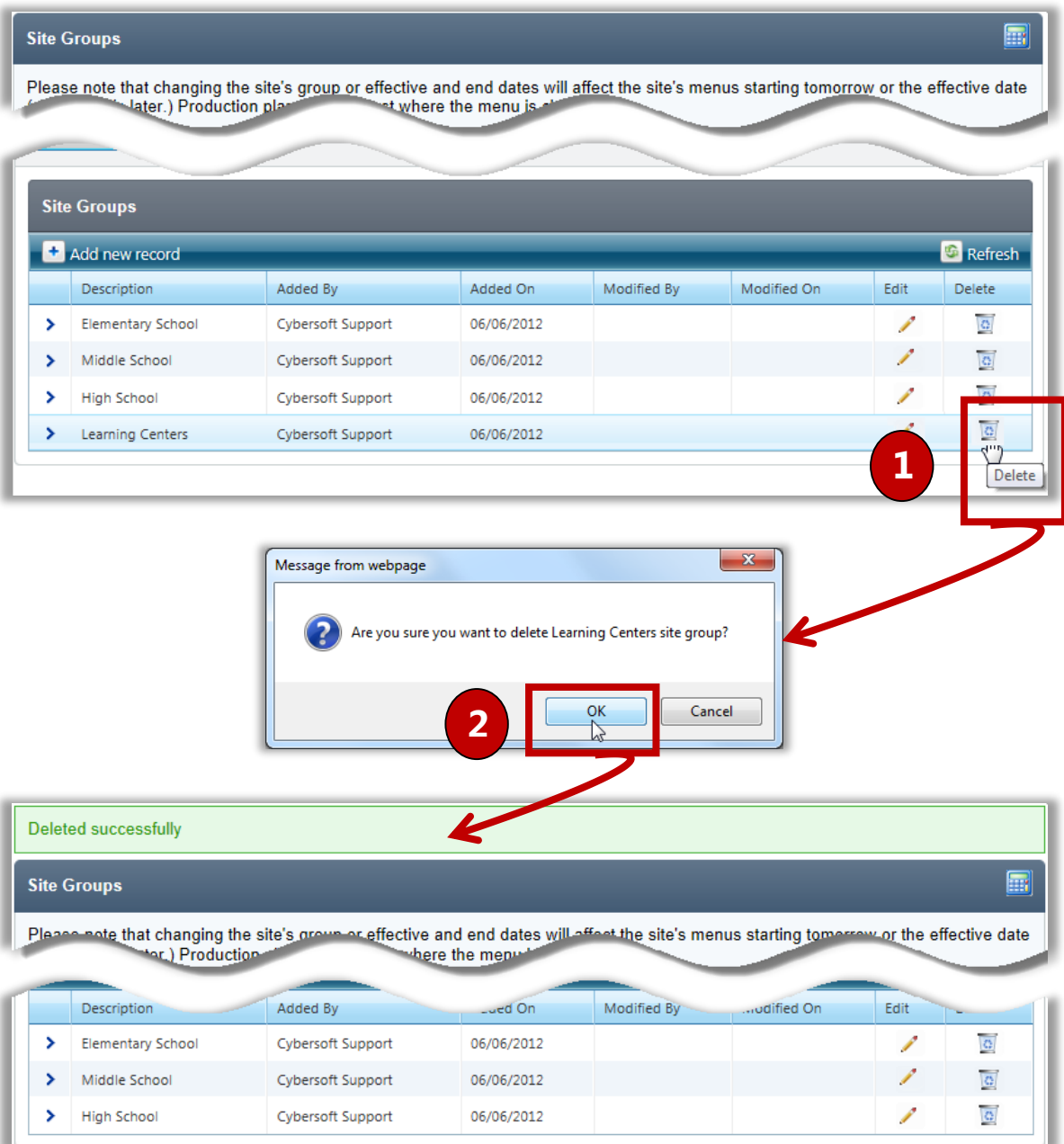
- Top Section: Site Groups Interface**
 - A warning message at the top states: "Please note that changing the site's group or effective and end dates will affect the site's menus starting tomorrow or the effective date (whichever is later.) Production plans may be lost where the menu is changed."
 - A table lists site groups. The "Elementary School" group is expanded, showing a sub-table of sites.
 - The sub-table has columns: Site Name, Effective Date, End Date, Added By, Added On, Modified By, Modified On, Edit, and Delete.
 - The row for "1960 ELEMENTARY SCHOOL" is highlighted. A red circle with the number "1" is placed over the "Delete" icon in the "Delete" column.
- Middle Section: Confirmation Dialog**
 - A "Message from webpage" dialog box appears with the question: "Are you sure you want to remove 1960 ELEMENTARY SCHOOL from its site group?"
 - A red circle with the number "2" is placed over the "OK" button.
- Bottom Section: Success Confirmation**
 - A green banner at the top of the interface says "Deleted successfully".
 - The "Site Groups" interface is shown again, but the "1960 ELEMENTARY SCHOOL" entry has been removed from the list.

Deleting a Site Group

A Site Group can be removed (deleted) only if no Sites are included in the group.









To delete a site group

1. Click **Delete** () in a Site Group listing.
2. Click  .



Site Groups

Please note that changing the site's group or effective and end dates will affect the site's menus starting tomorrow or the effective date (later.) Production plan where the menu is shown.

Description	Added By	Added On	Modified By	Modified On	Edit	Delete
> Elementary School	Cybersoft Support	06/06/2012				
> Middle School	Cybersoft Support	06/06/2012				
> High School	Cybersoft Support	06/06/2012				
> Learning Centers	Cybersoft Support	06/06/2012				

Message from webpage







Are you sure you want to delete Learning Centers site group?

OK **Cancel**

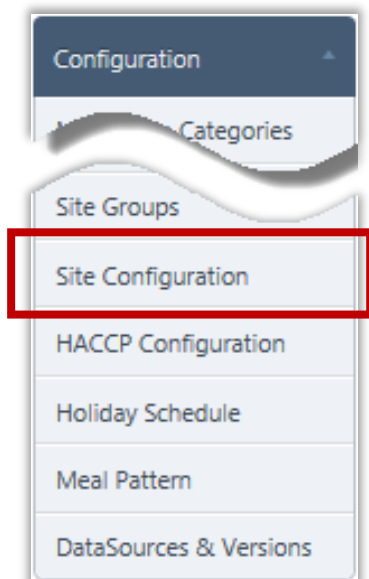
Deleted successfully

Site Groups

Please note that changing the site's group or effective and end dates will affect the site's menus starting tomorrow or the effective date (later.) Production plan where the menu is shown.

Description	Added By	Added On	Modified By	Modified On	Edit	Delete
> Elementary School	Cybersoft Support	06/06/2012				
> Middle School	Cybersoft Support	06/06/2012				
> High School	Cybersoft Support	06/06/2012				

Site Configuration



Site Configuration specifies for each feeding site:

- **Meal Service(s)** provided
- **Menu Lines** offered for each meal service
- **Site Group** to which the feeding site belongs
- **Feeding Effective Date** (Start Date)
- **Feeding End Date** (Stop Date)

A Site Configuration must be established for each feeding site to allow assignment of Menus on a Menu Calendar to the site.

Site Configuration Page

 A screenshot of the 'Site Configuration' page. At the top, there are search filters: 'Site Code' (empty text box), 'Site Name' (empty text box), and 'Site Group' (dropdown menu set to '-- ALL'). Below these is a 'Status' dropdown set to 'Not Configured' and an 'Apply' button. The main section is titled 'Not Configured Sites' and contains a table with the following data:

Site Name	Site Code	Site Group	Meal Services
ELEMENTARY	201	Elementary School	
ELEMENTARY	204	Elementary School	
000		Elementary School	
ELT...		Elementary School	
ELEMENTARY	203	Elementary School	
HIGH	216	High School	
MIDDLE	217	Middle School	

 At the bottom, there are navigation buttons (back, first, previous, next, last) and a 'Page size' dropdown set to '10'. The footer indicates '18 items in 2 pages'.

By default on the **Site Configuration** page:

- **Site Code** and **Site Name** are blank (empty)
- Site Group is set to “**ALL**”
- Status is set to “**Not Configured**”
- All non-configured sites are displayed in the **Not Configured Sites** list.

Displaying Site Configuration Details

To display configuration details for a site

1. Select configured in **Status**.
2. Click **Apply**.
3. Click a **Site Name** link in a site listing.
4. Click **Cancel** to close the **Site Configuration Details** popup.

Site Configuration

Site Code: Site Name: Site Group: -- ALL --

Status: Configured **Apply**

Configured Sites

Site Name	Site Code	Site Group	Meal Services
HIGH SCHOOL		High School	Breakfast, Lunch, Snack
MIDDLE		Middle School	Breakfast, Lunch, Snack
ELEMENTARY		Elementary School	Breakfast, Lunch

PrimeroEdge - Site Configuration Details

Site Name: HIGH SCHOOL

Meal Services:

Meal Service	Serves	Is OVS Default	Lines
Breakfast	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Hamburger & Hot Dog <input checked="" type="checkbox"/> Regular <input type="checkbox"/> Taco
Lunch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Hamburger & Hot Dog <input checked="" type="checkbox"/> Regular <input type="checkbox"/> Taco
Snack	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Hamburger & Hot Dog <input type="checkbox"/> Regular <input checked="" type="checkbox"/> Taco

Existing Site Groups:

Site Group Name	Effective Date	End Date
High School	10/01/2012	

Site Group: High School Effective Date: 10/1/2012

Please note that saving changes here will affect this site's menus starting tomorrow or the effective date (whichever is later.) Production plans may be lost where the menu is changed.

Save and Close **Cancel**

Configuring a Site

To configure a site

1. Click a [Site Name](#) link in the **Not Configured Sites** list.
2. Select all **Meal Services** and **Lines** for each Meal Service.
3. Select **Site Group** and **Effective Date**.
4. Click **Save and Close**.

Not Configured Sites			
Site Name	Site Code	Site Group	Meal Services
ABRAHAM LINCOLN MIDDLE SCHOOL	1203		
ANDREW JACKSON HIGH SCHOOL	1305		
CENTRAL OFFICE	0000		
GEORGE WASHINGTON ELEMENTARY SCHOOL	1101		
THOMAS JEFFERSON ELEMENTARY SCHOOL	1102		

Site Configuration Details

Site Name: GEORGE WASHINGTON ELEMENTARY SCHOOL

Meal Service	Serves	Is OVS Default	Lines
Breakfast	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> A La Carte <input type="checkbox"/> Hamburger Line <input type="checkbox"/> Pizza Line <input checked="" type="checkbox"/> Regular
Lunch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> A La Carte <input checked="" type="checkbox"/> Hamburger Line <input checked="" type="checkbox"/> Pizza Line <input checked="" type="checkbox"/> Regular
Snack	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> A La Carte <input type="checkbox"/> Hamburger Line <input type="checkbox"/> Pizza Line <input type="checkbox"/> Regular

Site Configuration Details

Site Name: GEORGE WASHINGTON ELEMENTARY SCHOOL

Meal Service	Serves	Is OVS Default	Lines
Summer Lunch	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Hamburger Line <input type="checkbox"/> Pizza Line <input type="checkbox"/> Regular

to display.

Site Group: Elementary School Effective Date: 3/1/2013

Please note that saving changes here will affect this site's menus starting tomorrow or the effective date (whichever is later.)
Production plans may be lost where the menu is changed.

Save and Close Cancel

Updating Site Details

To update details for a configured site:

1. Click a [Site Name](#) link.
2. Make changes in **Meal Services**, **Menu Lines** and **Site Group** as needed.
3. Click **Save and Close**.

1

The first screenshot shows the 'Site Configuration' window. It has fields for Site Code, Site Name, Site Group (dropdown), Status (dropdown), and a Search button. Below is a table titled 'Configured Sites'.

Site Name	Site Code	Site Group	Meal Services
SMITHVILLE ELEMENTARY	207	Elementary School	Lunch, Snack

A red box highlights the 'SMITHVILLE ELEMENTARY' link, and a red arrow points to the second screenshot.

2

The second screenshot shows the 'PrimeroEdge - Site Configuration Details' window. It displays details for 'SMITHVILLE ELEMENTARY'.

Site Name: SMITHVILLE ELEMENTARY

Meal Services:

Meal Service	Serves	Is OVS Default	Lines
Breakfast	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Hamburger & Hot Dog <input checked="" type="checkbox"/> Regular <input type="checkbox"/> Taco
Lunch	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Hamburger & Hot Dog <input checked="" type="checkbox"/> Regular <input checked="" type="checkbox"/> Taco
Snack	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Hamburger & Hot Dog <input type="checkbox"/> Regular <input type="checkbox"/> Taco

Existing Site Groups:

Site Group Name	Effective Date	End Date
Elementary School	10/01/2012	

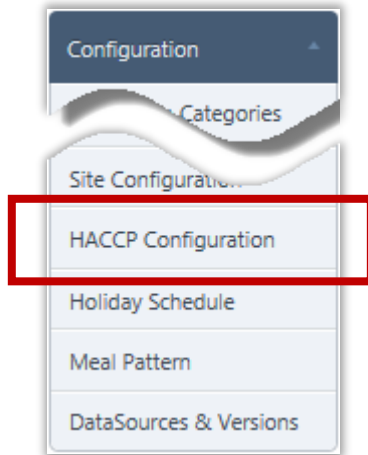
Site Group: Elementary School Effective Date: 10/1/2012

3

A red box highlights the 'Save and Close' button at the bottom of the window.

Please note that saving changes here will affect this site's menus starting tomorrow or the effective date (whichever is later.) Production plans may be lost where the menu is changed.

HACCP Configuration



HACCP Configuration lists all HACCP (Hazard Analysis Critical Control Point) processes used by the district. HACCP is a process that has been established for juice, meat, poultry and seafood processing in order to prevent food-borne illness.

A hazard analysis develops a list of hazards which are reasonably likely to cause injury or illness if not effectively controlled.

A critical control point is a step at which control can be applied and is essential to prevent or eliminate a food safety hazard or reduce it to an acceptable level.

HACCP Page

HACCP Configuration

Data Source
 -- ALL -- Apply

HACCP Processes

+ Add new record Refresh

Process Description	Short Name	Added By	Added On	Modified By	Modified On	Detail	Delete
Process 1: No Cook	No Cook	Cybersoft Support	7/22/2011 7:55 PM				
Process 2: Same day service	Same day service	Cybersoft Support	7/22/2011 7:59 PM				
Process 3: Complex food	Complex food	Cybersoft Support	7/22/2011 8:02 PM				

1
Page size: 10
3 items in 1 pages

HACCP CCPs (Critical control points)

+ Add new record Refresh

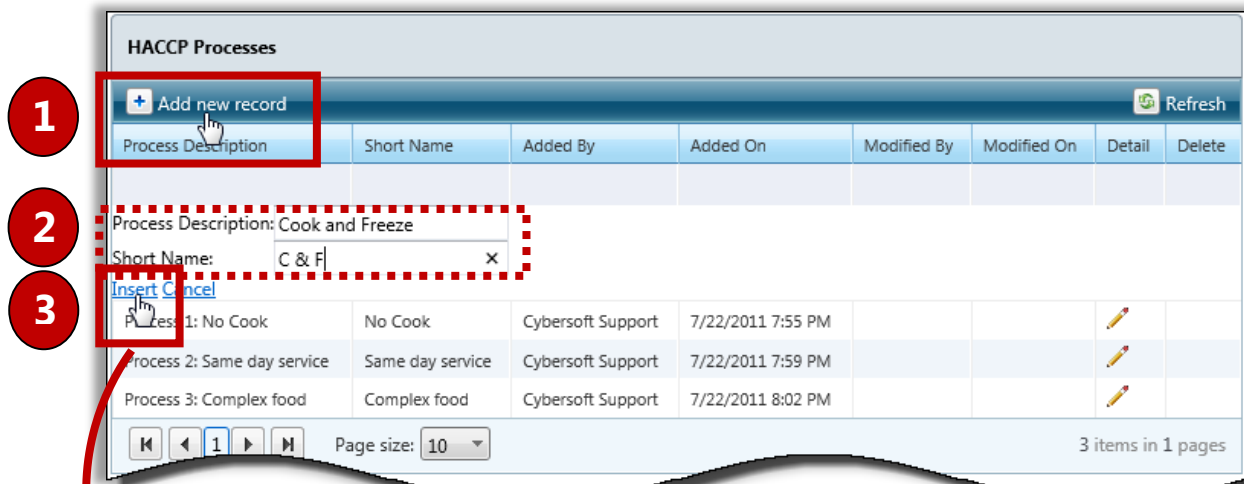
CCP Description	Short Name	Critical Limit	Default Corrective Action	Modified By/On	Edit	Delete
Cold	Cold Hold	Hold at <= 41.00 °F	Discard the food if it cannot be determined how long the food temperature	Added By: Cybersoft Support Added on 7/22/2011		
Cooking	Cook	Heat to <= 165.00 °F for 15 seconds	Continue cooking food until the internal temperature reaches the required temperature.	Added By: Cybersoft Support Added on 7/22/2011		

1
Page size: 10
7 items in 1 pages

Adding a HACCP Process

To add a HACCP process

1. Click .
2. Enter a name for the process in **Process Description** and a brief name in **Short Name**.
3. Click [Insert](#).

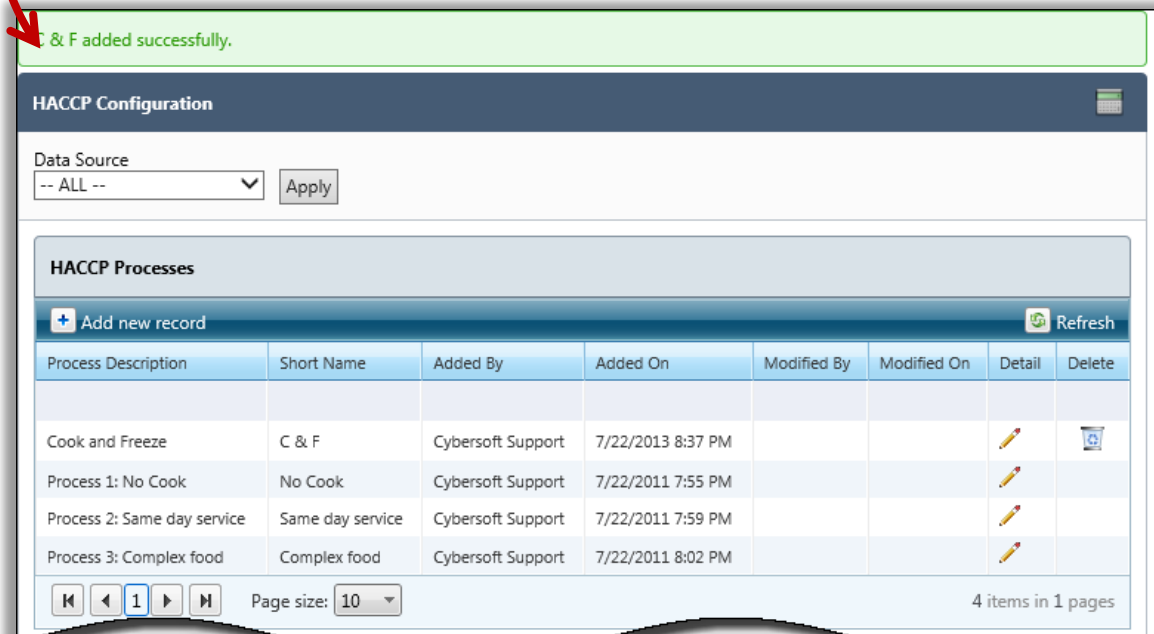


HACCP Processes

[+ Add new record](#) [Refresh](#)

Process Description	Short Name	Added By	Added On	Modified By	Modified On	Detail	Delete
Process Description: Cook and Freeze							
Short Name: C & F							
Insert Cancel							
Process 1: No Cook	No Cook	Cybersoft Support	7/22/2011 7:55 PM				
Process 2: Same day service	Same day service	Cybersoft Support	7/22/2011 7:59 PM				
Process 3: Complex food	Complex food	Cybersoft Support	7/22/2011 8:02 PM				

Page size: 10 3 items in 1 pages



C & F added successfully.

HACCP Configuration

Data Source: -- ALL -- [Apply](#)

HACCP Processes




[+ Add new record](#) [Refresh](#)

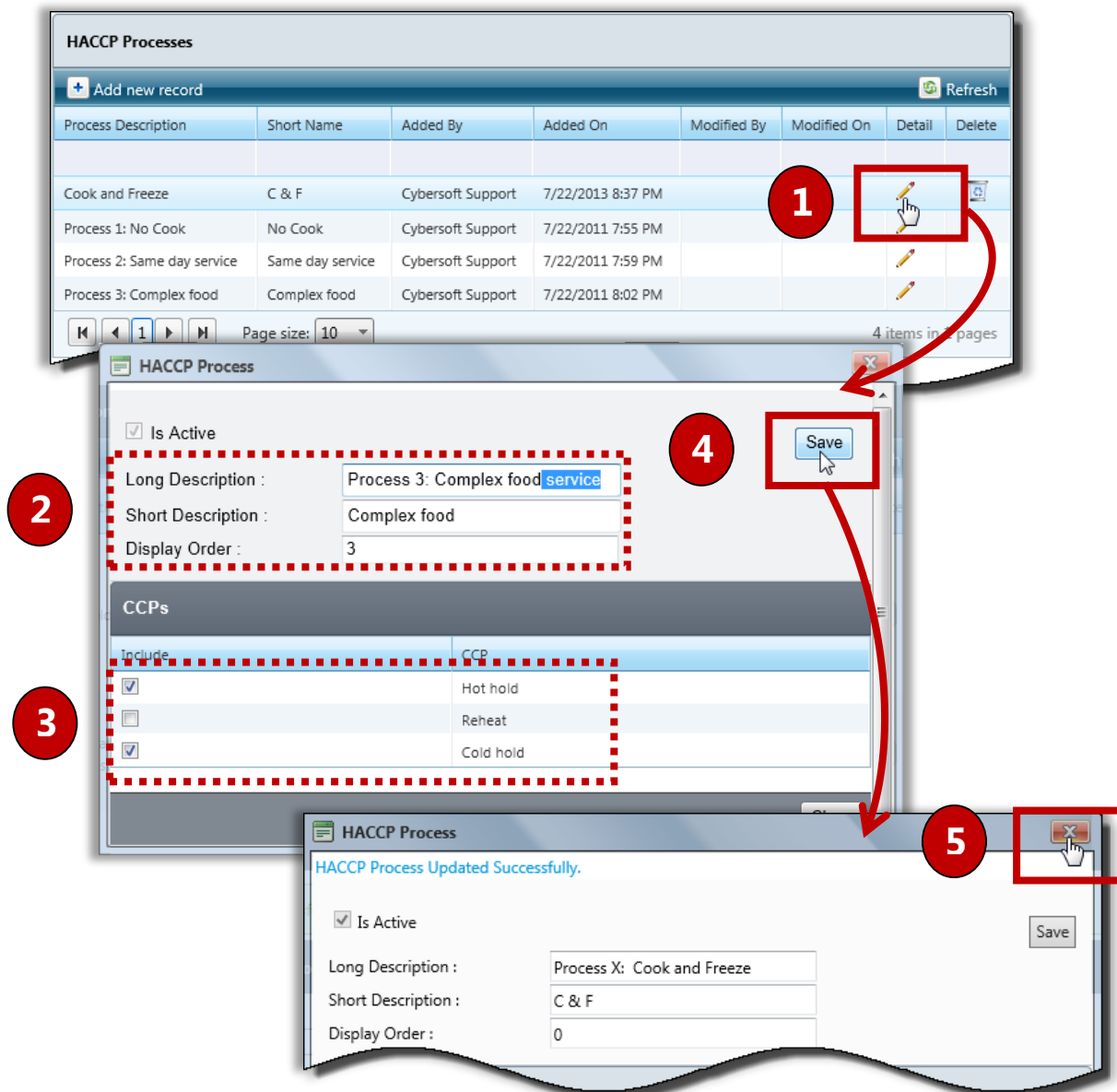
Process Description	Short Name	Added By	Added On	Modified By	Modified On	Detail	Delete
Cook and Freeze	C & F	Cybersoft Support	7/22/2013 8:37 PM				
Process 1: No Cook	No Cook	Cybersoft Support	7/22/2011 7:55 PM				
Process 2: Same day service	Same day service	Cybersoft Support	7/22/2011 7:59 PM				
Process 3: Complex food	Complex food	Cybersoft Support	7/22/2011 8:02 PM				

Page size: 10 4 items in 1 pages


Updating a HACCP Process

To update a HACCP process


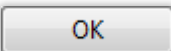
1. Click **Edit** () in a HACCP process listing.
2. Change **Long Description** or **Short Description** text or **Display Order**, as needed.
3. Select or clear **Critical Control Processes (CCPs)**.
4. Click  .
5. Click  .

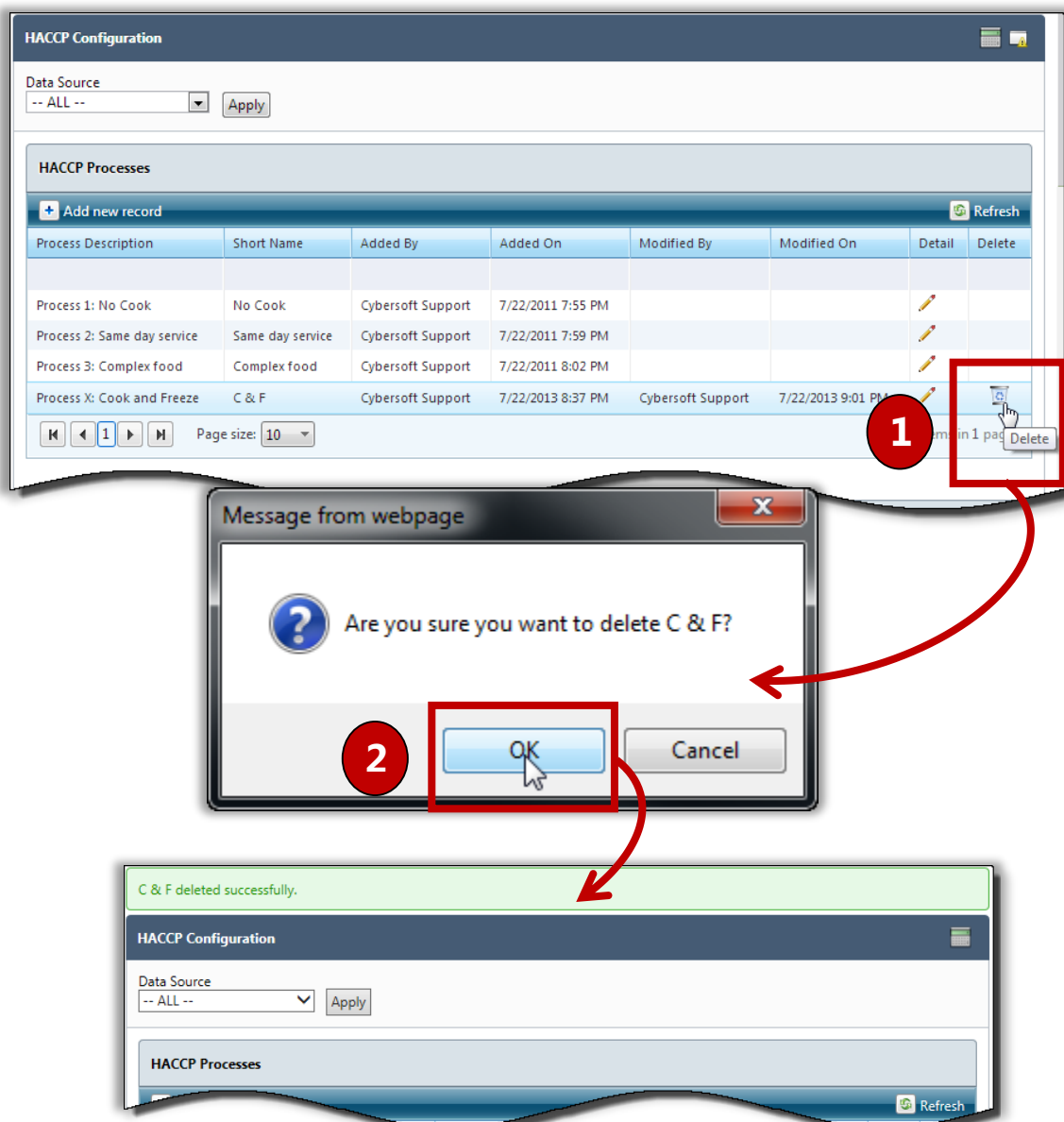


Deleting a HACCP Process

A HACCP process can be deleted only if it is not assigned to a Recipe. When a HACCP process is assigned to a Recipe, the **Delete** () icon does not appear in the process listing in the **HACCP Processes** list.

To delete a HACCP process

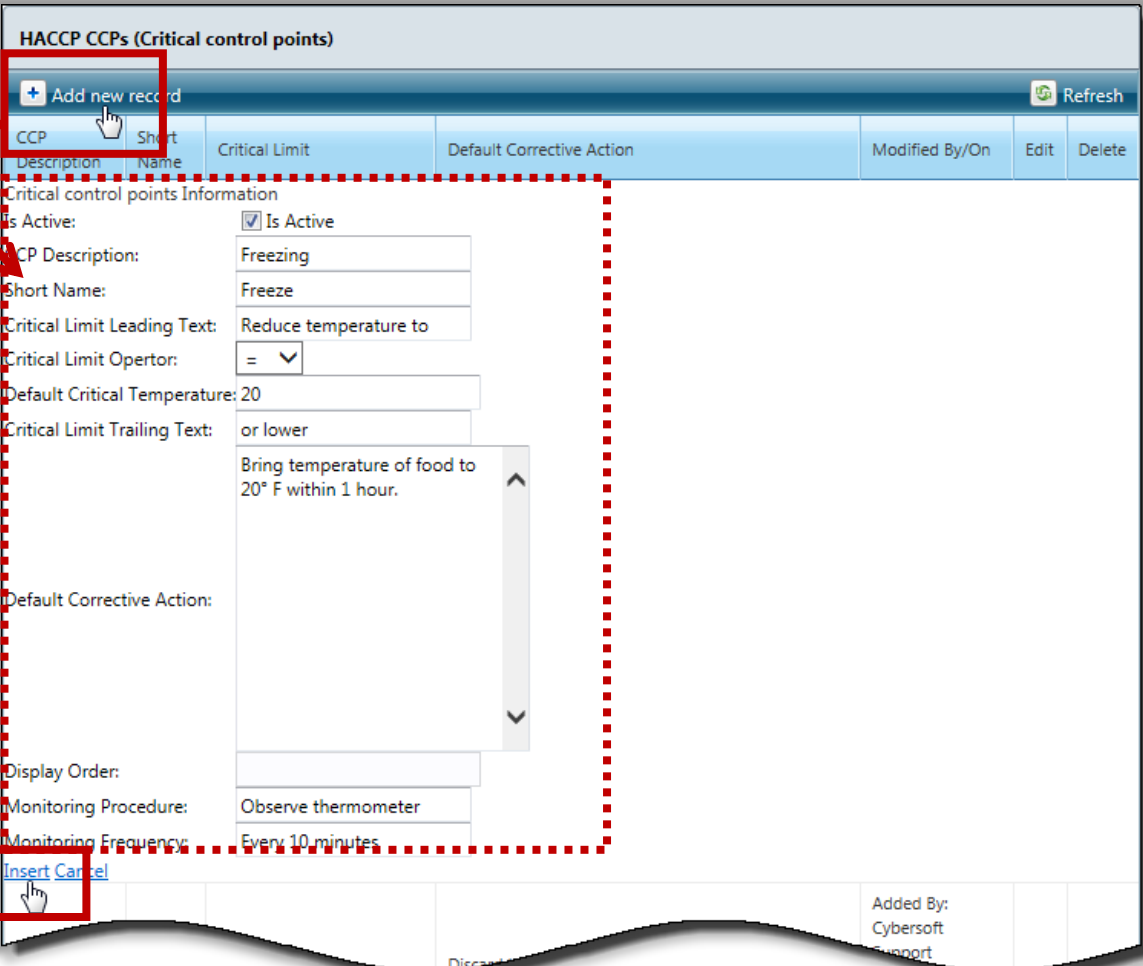
1. Click **Delete** () in a process listing.
2. Click  to confirm the removal.



Adding a Critical Control Point

To add a Critical Control Point (CCP)

1. Click .
2. Enter or select Critical Control Point information.
3. Click [Insert](#).



The screenshot shows the 'HACCP CCPs (Critical control points)' form. A red dashed box highlights the form fields, and a red arrow points from the 'Add new record' button to the 'Insert' button. The form fields include:

- Is Active:** ☒ Is Active
- CCP Description:** Freezing
- Short Name:** Freeze
- Critical Limit Leading Text:** Reduce temperature to
- Critical Limit Operator:** =
- Default Critical Temperature:** 20
- Critical Limit Trailing Text:** or lower
- Default Corrective Action:** Bring temperature of food to 20° F within 1 hour.
- Display Order:**
- Monitoring Procedure:** Observe thermometer
- Monitoring Frequency:** Every 10 minutes


The 'Insert' button is located at the bottom left of the form. Below the form, a green message box states 'Freeze added successfully.'

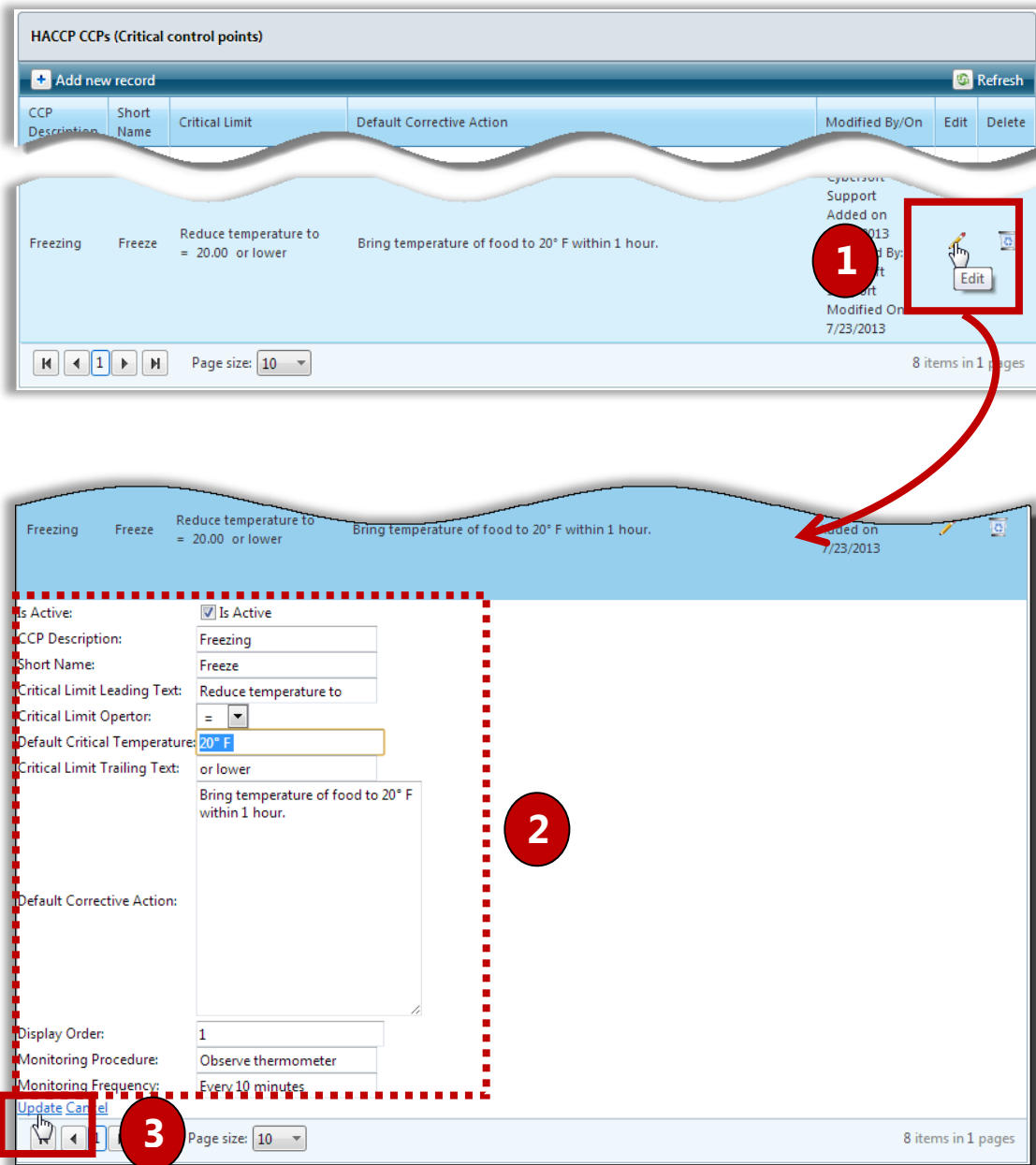
HACCP Configuration

Data Source:



Updating a Critical Control Point

To update a Critical Control Point (CCP)

1. Click **Edit** () in a Critical Control Point listing.
2. Make changes to CCP information, as needed.
3. Click [Update](#).



The screenshot displays the HACCP CCPs (Critical control points) interface. The top section shows a table with columns: CCP Description, Short Name, Critical Limit, Default Corrective Action, Modified By/On, Edit, and Delete. A red circle with the number 1 highlights the 'Edit' button in the table. Below the table, a red arrow points to the 'Edit' button in the bottom right corner of the table. The bottom section shows the 'Edit' form for a CCP. A red dashed box highlights the form fields, and a red circle with the number 2 is placed next to it. The form fields include: Is Active (checked), CCP Description (Freezing), Short Name (Freeze), Critical Limit Leading Text (Reduce temperature to), Critical Limit Operator (=), Default Critical Temperature (20° F), Critical Limit Trailing Text (or lower), Default Corrective Action (Bring temperature of food to 20° F within 1 hour), Display Order (1), Monitoring Procedure (Observe thermometer), and Monitoring Frequency (Every 10 minutes). A red circle with the number 3 highlights the 'Update' button at the bottom left of the form.

CCP Description	Short Name	Critical Limit	Default Corrective Action	Modified By/On	Edit	Delete
Freezing	Freeze	Reduce temperature to = 20.00 or lower	Bring temperature of food to 20° F within 1 hour.	Added on 7/23/2013 Modified On 7/23/2013		

Page size: 10

8 items in 1 pages

Is Active: ☒ Is Active

CCP Description: Freezing

Short Name: Freeze

Critical Limit Leading Text: Reduce temperature to

Critical Limit Operator: =

Default Critical Temperature: 20° F

Critical Limit Trailing Text: or lower

Default Corrective Action: Bring temperature of food to 20° F within 1 hour.

Display Order: 1

Monitoring Procedure: Observe thermometer


Monitoring Frequency: Every 10 minutes

Update Cancel


Page size: 10

8 items in 1 pages

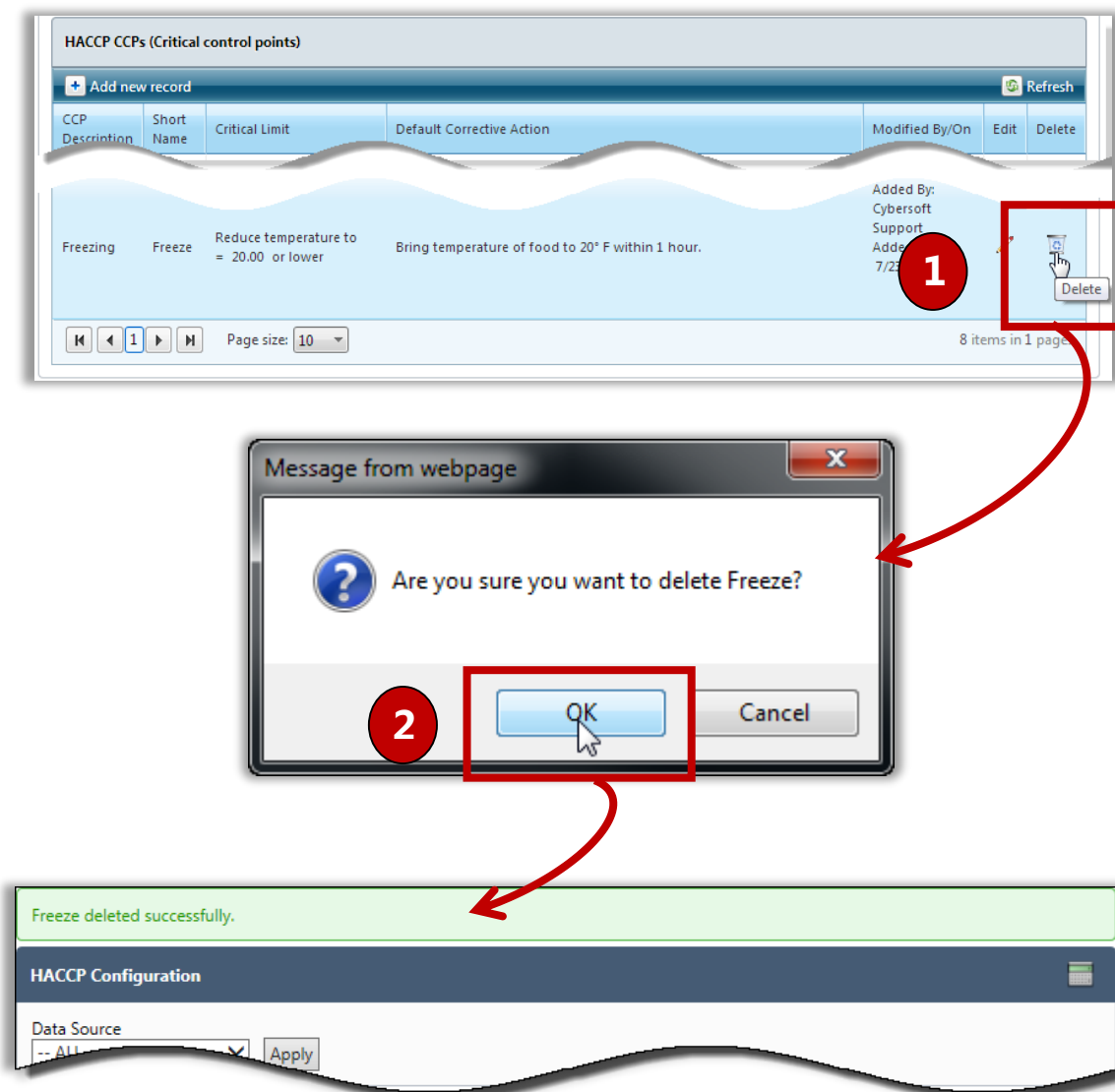
Deleting a Critical Control Point

A Critical Control Point can be deleted only if it is not assigned to a Recipe. When a CCP is assigned to a Recipe, the **Delete** () icon does not appear in the CCP listing in the **HACCP CCPs (Critical control points)** list.

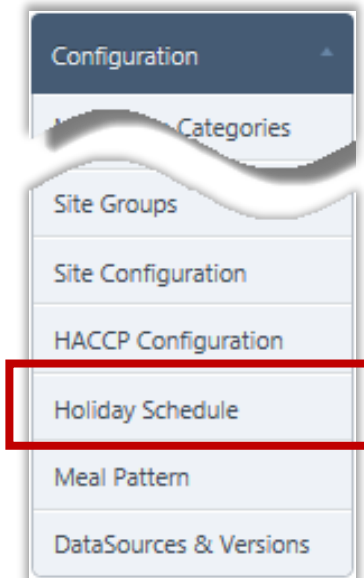
To delete a Critical Control Point

1. Click **Delete** () in a CCP listing in the **HACCP CCPs** group.

2. Click  .



Holiday Schedule



Holiday Schedule adds and manages the description of days designated as holidays, In-service, breaks, or other days on which no meal service is provided and to which Menus are not usually assigned.

Holiday dates and descriptions can be changed as needed. Holidays can be removed from the Holiday Schedule only if the Holiday date has not passed.

Holidays are set up before Menu assignment begins.

Holiday Schedule Page

Holiday Schedule				
+ Add new record				
Date	Description	Added on	Edit	Delete
11/29/2013	Thanksgiving Break	7/21/2013 6:13 PM		
11/28/2013	Thanksgiving Break	7/21/2013 6:13 PM		
9/6/2013	Teacher Inservice	7/21/2013 6:12 PM		
1/2/2012	Happy New Year	11/18/2011 11:28 PM		
12/26/2011	Merry christmas	11/18/2011 11:28 PM		
12/5/2011	Holiday	11/18/2011 11:28 PM		
11/11/2011	Holiday	11/18/2011 11:28 PM		


By default on the **Holiday Schedule** page:

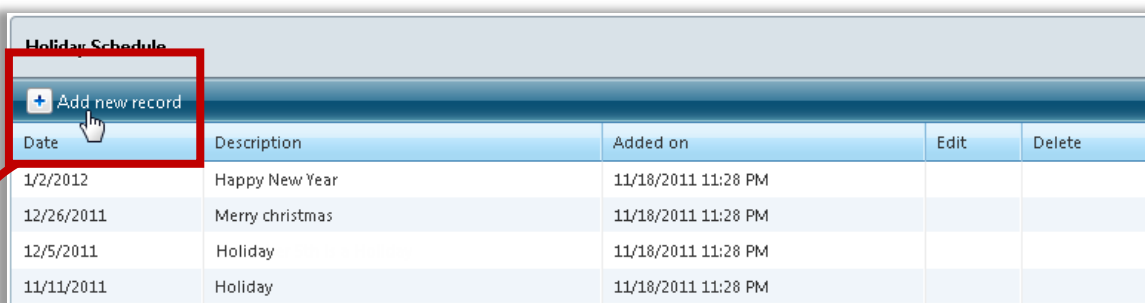
- All existing holidays are listed in the **Holiday Schedule** group.

Adding a Holiday

Holidays can be added for the current day or for any future day.

To add a holiday

1. Click  in the **Holiday Schedule** group.
2. Enter or select the holiday date.
3. Enter the holiday name in **Description**.
4. Click [Insert](#).



Holiday Schedule

[+ Add new record](#)

Date	Description	Added on	Edit	Delete
1/2/2012	Happy New Year	11/18/2011 11:28 PM		
12/26/2011	Merry christmas	11/18/2011 11:28 PM		
12/5/2011	Holiday	11/18/2011 11:28 PM		
11/11/2011	Holiday	11/18/2011 11:28 PM		



Holiday Schedule

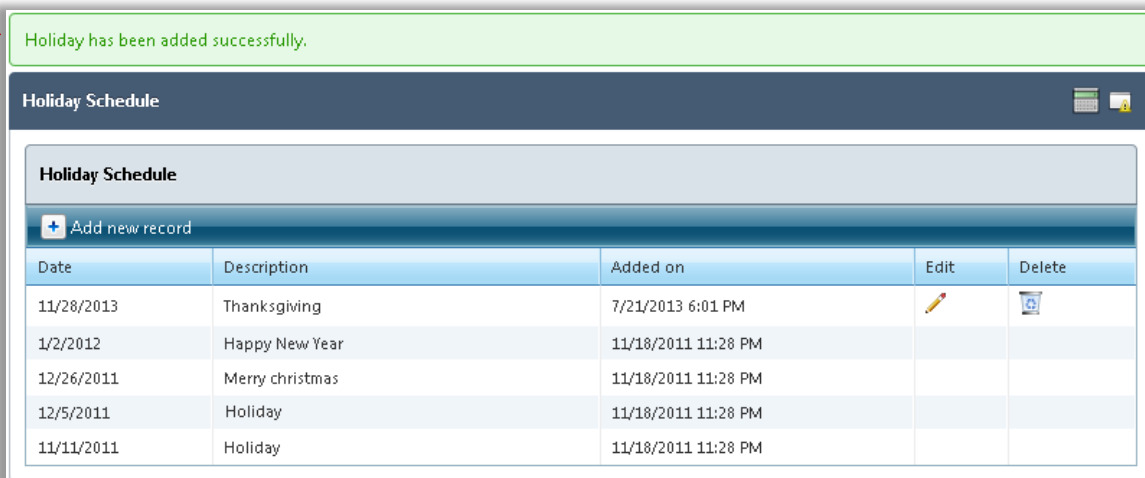
[+ Add new record](#)

Date: 11/28/2013

Description: Thanksgiving

[Insert](#) [Cancel](#)



Date	Description	Added on	Edit	Delete
1/2/2012	Happy New Year	11/18/2011 11:28 PM		
12/26/2011	Merry christmas	11/18/2011 11:28 PM		
12/5/2011	Holiday	11/18/2011 11:28 PM		
11/11/2011	Holiday	11/18/2011 11:28 PM		



Holiday has been added successfully.


Holiday Schedule

[+ Add new record](#)

Date	Description	Added on	Edit	Delete
11/28/2013	Thanksgiving	7/21/2013 6:01 PM		
1/2/2012	Happy New Year	11/18/2011 11:28 PM		
12/26/2011	Merry christmas	11/18/2011 11:28 PM		
12/5/2011	Holiday	11/18/2011 11:28 PM		
11/11/2011	Holiday	11/18/2011 11:28 PM		

Updating Holiday Details

To change a Holiday description

1. Click  in a listing in the **Holiday Schedule** group.
2. Enter or select a date and enter a new **Description**, as needed
3. Click [Update](#).


Holiday Schedule

+ Add new record

Date	Description	Added on	Edit	Delete
11/28/2013	Thanksgiving	7/21/2013 6:01 PM	 Edit	
1/2/2012	Happy New Year	11/18/2011 11:28 PM		
12/26/2011	Merry christmas	11/18/2011 11:28 PM		
12/5/2011	Holiday	11/18/2011 11:28 PM		
11/11/2011	Holiday	11/18/2011 11:28 PM		

Holiday Schedule

+ Add new record

Date	Description	Added on	Edit	Delete
11/28/2013	Thanksgiving	7/21/2013 6:01 PM		

Date: 11/28/2013 

Description: Thanksgiving Break


[Update](#) [Cancel](#)

Date	Description	Added on	Edit	Delete
1/2/2012	Happy New Year	11/18/2011 11:28 PM		
12/26/2011	Merry christmas	11/18/2011 11:28 PM		
12/5/2011	Holiday	11/18/2011 11:28 PM		
11/11/2011	Holiday	11/18/2011 11:28 PM		

Holiday has been updated successfully.

Holiday Schedule


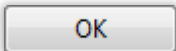
+ Add new record

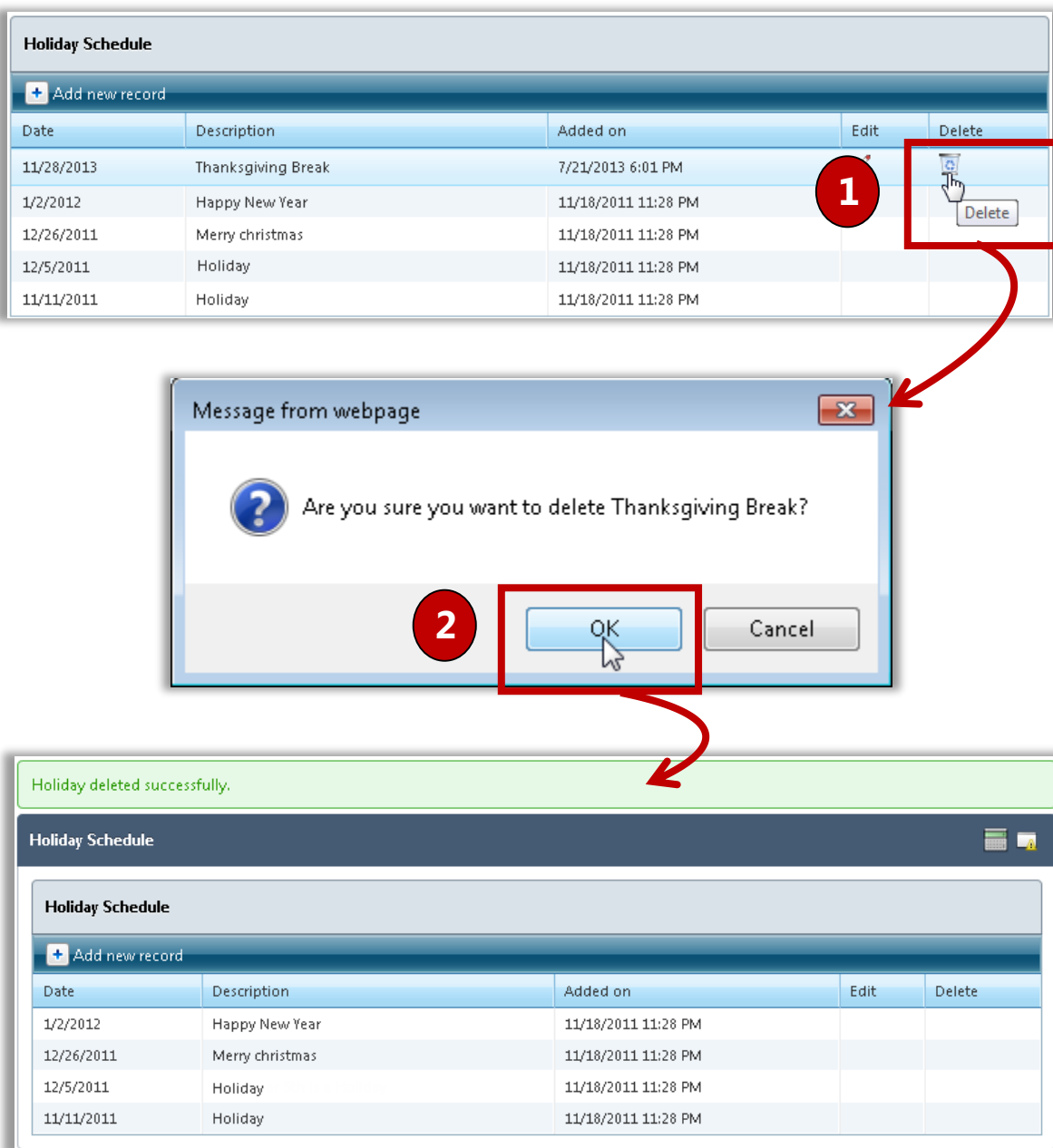
Date	Description	Added on	Edit	Delete
11/28/2013	Thanksgiving Break	7/21/2013 6:01 PM		
1/2/2012	Happy New Year	11/18/2011 11:28 PM		
12/26/2011	Merry christmas	11/18/2011 11:28 PM		
12/5/2011	Holiday	11/18/2011 11:28 PM		
11/11/2011	Holiday	11/18/2011 11:28 PM		

Deleting a Holiday

Only future Holidays can be removed. The **Delete** () icon is not available for Holidays on past dates.


To delete a Holiday

1. Click **Delete** () in a Holiday listing in the **Holiday Schedule** group.
2. Click  .



Holiday Schedule

+ Add new record

Date	Description	Added on	Edit	Delete
11/28/2013	Thanksgiving Break	7/21/2013 6:01 PM		
1/2/2012	Happy New Year	11/18/2011 11:28 PM		
12/26/2011	Merry christmas	11/18/2011 11:28 PM		
12/5/2011	Holiday	11/18/2011 11:28 PM		
11/11/2011	Holiday	11/18/2011 11:28 PM		

Message from webpage

Are you sure you want to delete Thanksgiving Break?

OK Cancel

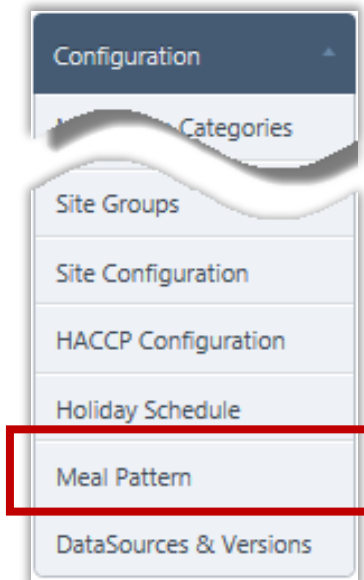
Holiday deleted successfully.

Holiday Schedule

+ Add new record

Date	Description	Added on	Edit	Delete
1/2/2012	Happy New Year	11/18/2011 11:28 PM		
12/26/2011	Merry christmas	11/18/2011 11:28 PM		
12/5/2011	Holiday	11/18/2011 11:28 PM		
11/11/2011	Holiday	11/18/2011 11:28 PM		

Meal Pattern



Meal Pattern allows you to create and manage standard and local meal patterns for serving groups of patrons.

Standard meal pattern requirements are viewed by serving group and meal service. Local meal patterns are created and changed as needed by establishing local serving groups and meal services.

Meal Pattern Page

Meal Pattern									
Meal Pattern List									
Refresh									
	Meal Pattern	Type	Is Food Based	Added By	Added On	Last Modified By	Last Modified On	Edit	Delete
>	[USDA] Modified RDA	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM				
>	[USDA] Standard RDA	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM				
>	Adults 51+	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM				
>	[USDA] Traditional Meal Pattern	Grade Based	True	Cybersoft Support	5/25/2011 11:53 AM				
>	[USDA]Meal Pattern SY 2012-2014	Grade Based	True	Cybersoft Support	5/4/2012 3:15 PM				

By default on the **Meal Pattern** page:

- Five standard meal patterns are listed in the **Meal Pattern List**.
- Local meal patterns are listed after standard meal patterns.

Displaying Meal Pattern Details

To view Meal Pattern details

1. Expand a Meal Pattern listing in the **Meal Pattern List**.
2. Click a [Serving Group Name](#) link.
3. Click the Meal Service tab to view nutrient and food component requirements.

The image shows two screenshots from the PrimeroEdge Menu Planning application. The top screenshot is the 'Meal Pattern List' table, and the bottom screenshot is the 'Edit Serving Group' form.

Meal Pattern List

	Meal Pattern	Type	Is Food Based	Added By	Added On	Last Modified By	Last Modified On	Edit	Delete
>	[USDA] Modified RDA	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM				
>	[USDA] Standard RDA	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM				
>	Adults 51+	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM				
>	[USDA] Traditional Meal Pattern	Grade Based	True	Cybersoft Support	5/25/2011 11:53 AM				
>	[USDA] Meal Pattern SY 2012-2014	Grade Based	True	Cybersoft Support	5/4/2012 3:15 PM				

Callout 1 points to the expand icon (blue arrow) next to the '[USDA] Meal Pattern SY 2012-2014' row.

Callout 2 points to the 'K-5' serving group link in the expanded list.

Edit Serving Group

Back To Meal Pattern

Serving Group: K-5

Meal Pattern: [USDA]Meal Pattern SY 2012-2014

Services: Breakfast, Lunch

Group Name: K-5

Callout 3 points to the 'Lunch' tab in the 'Edit Serving Group' form.

USDA Standard


Nutrient	Standard
FE (Kcal)	[350.000 - 500.000]
Sfat (g)	<10.000 % calories

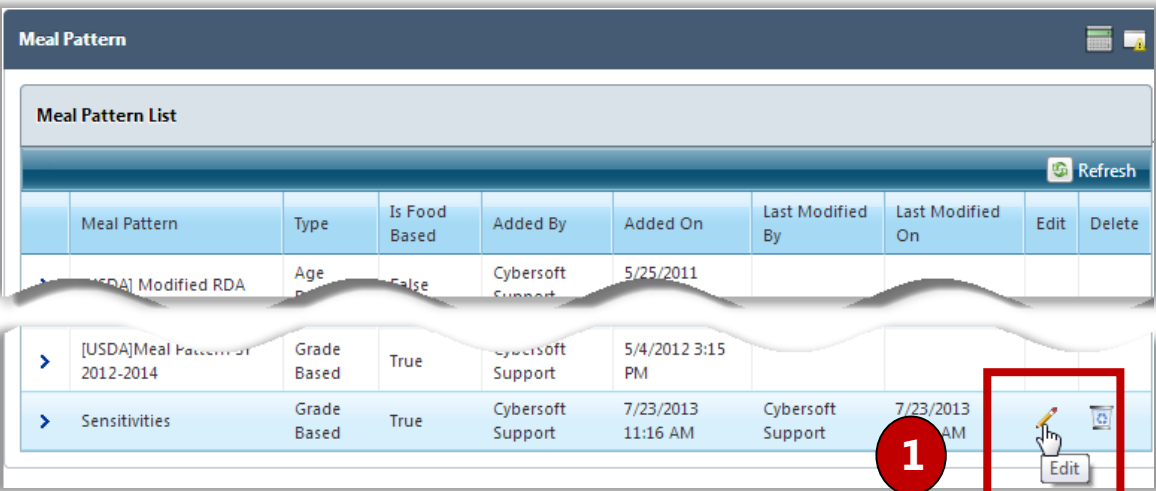
Food Component

Food Component	Daily Standard	Weekly Standard
Fruits (cups) (Fruit)	≥0.500	≥2.500
Fruit Juice only (Fruit-J)		≤50.000 %
Fluid Milk (cups) (MILK-F)	≥1.000	≥5.000
Varieties of Milk (MILK-V)	≥2.000	
Grains (oz eq) (Grains)	≥1.000	[7.000 - 10.000]
Whole Grain-Rich (WG)		≥50.000 % Grains (oz eq)
Grain Based Dessert (Grain-D)		≤2.000
Meat/Meat Alternates (oz eq) (Meat/MA)		≥0.000



Updating Meal Pattern Basis

To change Meal Pattern basis

1. Click **Edit** () in a Meal Pattern listing.
2. Change the **Meal Pattern** name, **Type**, or food basis, as needed.
3. Click [Update](#).



The screenshot shows the 'Meal Pattern' interface. At the top is a 'Meal Pattern List' table with columns: Meal Pattern, Type, Is Food Based, Added By, Added On, Last Modified By, Last Modified On, Edit, and Delete. A red circle with the number '1' highlights the 'Edit' button (pencil icon) in the 'Sensitivities' row.

Meal Pattern	Type	Is Food Based	Added By	Added On	Last Modified By	Last Modified On	Edit	Delete
[USDA] Modified RDA	Age Based	False	Cybersoft Support	5/25/2011				
[USDA]Meal Pattern 2012-2014	Grade Based	True	Cybersoft Support	5/4/2012 3:15 PM				
Sensitivities	Grade Based	True	Cybersoft Support	7/23/2013 11:16 AM	Cybersoft Support	7/23/2013 11:32 AM		

Below the table, the 'Edit' form for 'Sensitivities' is shown. A red dashed box highlights the form fields. A red circle with the number '2' highlights the 'Meal Pattern' dropdown menu, which currently shows 'Sensitivities'. A red circle with the number '3' highlights the 'Update' button. The form also includes a 'Type' dropdown set to 'Grade Based' and a checked 'Is Food Based' checkbox.


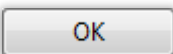
Below the form, a green message box states: 'Meal Pattern has been updated successfully.'

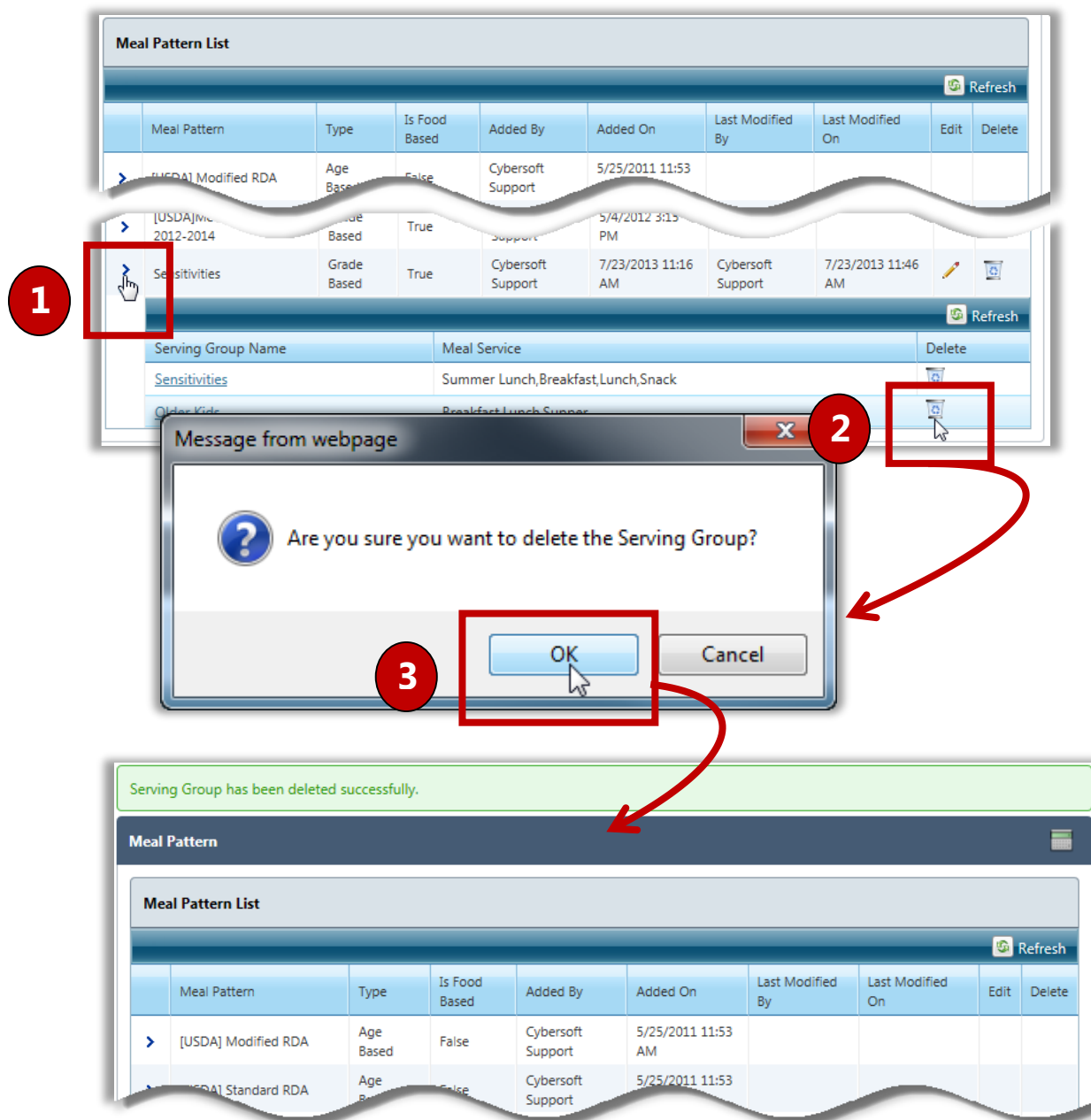
At the bottom, the 'Meal Pattern List' table is shown again, with a 'Refresh' button at the bottom right.

Deleting a Serving Group from a Meal Pattern

Serving Groups can be removed only from a custom Meal Pattern.

To delete a Serving Group


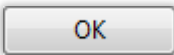
1. Expand a Meal Pattern listing.
2. Click **Delete** () in a Serving Group listing in the Meal Pattern.
3. Click  to confirm the removal.




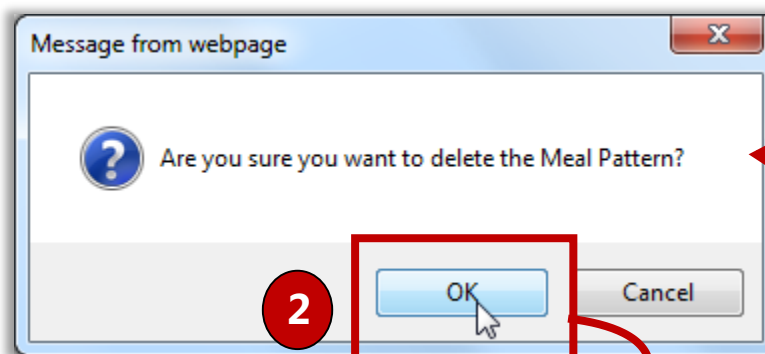
Deleting a Meal Pattern

Only custom Meal Patterns can be removed.

To delete a Meal Pattern

1. Click **Delete** () in a Meal Pattern listing.
2. Click  to confirm the removal.

Meal Pattern List									
Refresh									
	Meal Pattern	Type	Is Food Based	Added By	Added On	Last Modified By	Last Modified On	Edit	Delete
>	[USDA] Modified RDA	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM				
>	[USDA] Standard RDA	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM				
>	Adults 51+	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM				
>	[USDA] Traditional Meal Pattern	Grade Based	True	Cybersoft Support	5/25/2011 11:53 AM				
>	[USDA]Meal Pattern SY 2012-2014	Grade Based	True	Cybersoft Support	5/4/2012 3:15 PM				
>	Sensitivities	Grade Based	True	Cybersoft Support	7/23/2013 11:16 AM	Cybersoft Support	7/23/2013 11:16 AM		



Meal Pattern has been deleted successfully.									
Meal Pattern									
Meal Pattern List									
Refresh									
	Meal Pattern	Type	Is Food Based	Added By	Added On	Last Modified By	Last Modified On	Edit	Delete
		Based	False	Cybersoft					

Upgrading a Data Source

All accessible data sources can be upgraded to the most current version.

To upgrade a Data Source




1. Click **Edit** () in a Data Source listing.
2. Select a **Version**.
3. Click **Update**.

DataSources & Versions

Data Sources Owned

Data Source	Abbreviation	IngredientCodePrefix	RecipeCodePrefix	Data Source Type	AddedBy	AddedOn
Local	L	LI	LR	Local	Cybersoft Support	8/19/2011 10:45:03 AM

Accessible Data Sources

Data Source	Version	Owned By	Data Source Type	Upgrade
State Level	Version 1	West Virginia	Shared	
Child Nutrition Database	15	West Virginia	Global	
Cybersoft	Version 1	West Virginia	Global	




1

DataSources & Versions

Data Sources Owned

Data Source	Abbreviation	IngredientCodePrefix	RecipeCodePrefix	Data Source Type	AddedBy	AddedOn
Local	L	LI	LR	Local	Cybersoft Support	8/19/2011 10:45:03 AM

Accessible Data Sources

Data Source	Version	Owned By	Data Source Type	Upgrade
State Level	Version 1	West Virginia	Shared	
Child Nutrition Database	15	West Virginia	Global	
Cybersoft	Version 1	West Virginia	Global	

Version: **Version 1**

[Update](#) [Cancel](#)

3

Version updated successfully.

DataSources & Versions

Data Sources Owned

Data Source	Abbreviation	IngredientCodePrefix	RecipeCodePrefix	Data Source Type	AddedBy	AddedOn
Local	L	LI	LR	Local	Cybersoft Support	8/19/2011 10:45:03 AM

◀ *End of Section* ▶

A Working with PrimeroEdge

In this section you will learn:

- ✓ How to log into and out of PrimeroEdge.
- ✓ How to use the Dashboard groups.
- ✓ How to navigate to the Menu Planning module.
- ✓ How to use PrimeroEdge control features.
- ✓ Commonly used acronyms

Open PrimeroEdge




To open PrimeroEdge

1. Find the PrimeroEdge shortcut icon on your desktop
2. Double-click the icon.

The web login page appears.

Log In To PrimeroEdge

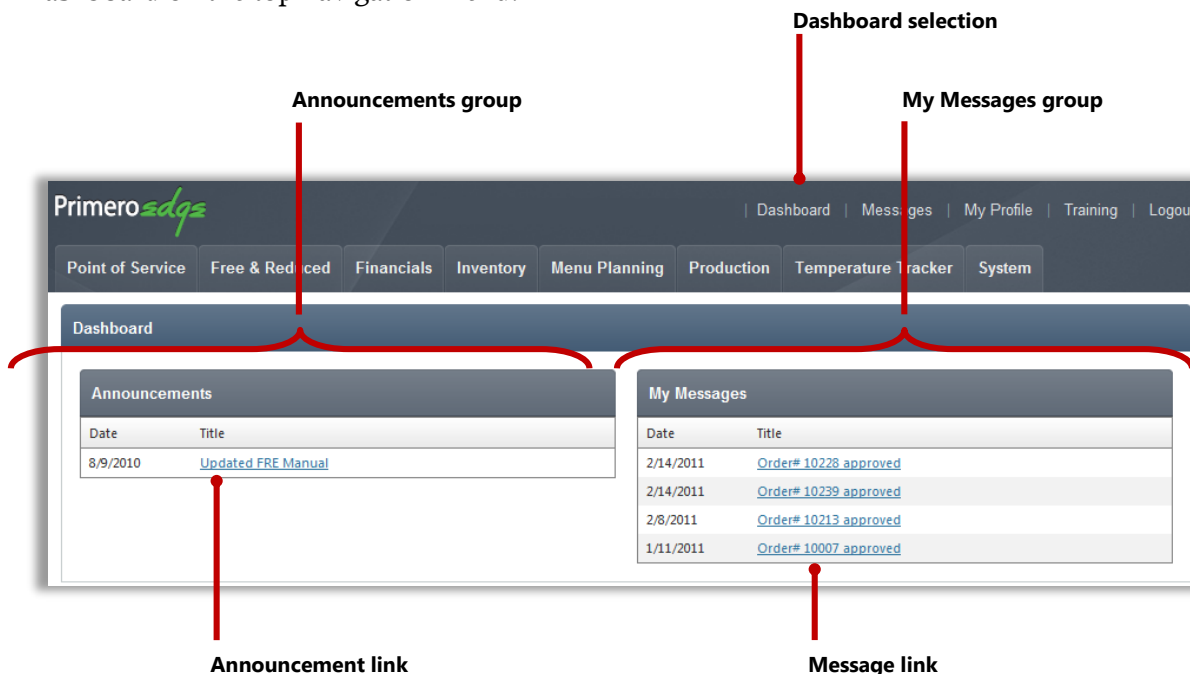
To log in to PrimeroEdge

1. In **Username**, enter your Username.
2. In **Password**, enter the password associated with your username.
3. Click  .

A screenshot of the PrimeroEdge login page. The page has a dark blue header with the "PrimeroEdge" logo in white and green. Below the header, there are two input fields: "Username" and "Password". To the left of the input fields, there are three red circles with white numbers 1, 2, and 3. A red dashed rectangle encloses the Username and Password fields. A red solid rectangle encloses the "Login" button at the bottom. The "Login" button is a light blue button with the word "Login" in black.

Tour the PrimerEdge Dashboard

The *Dashboard* page appears after a successful login. This page is accessed at any time by clicking **Dashboard** on the top navigation menu.

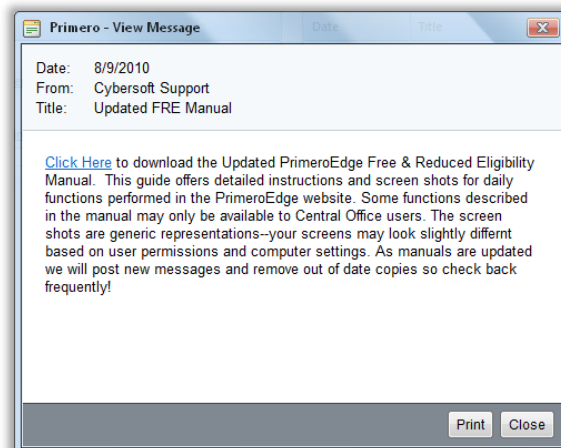
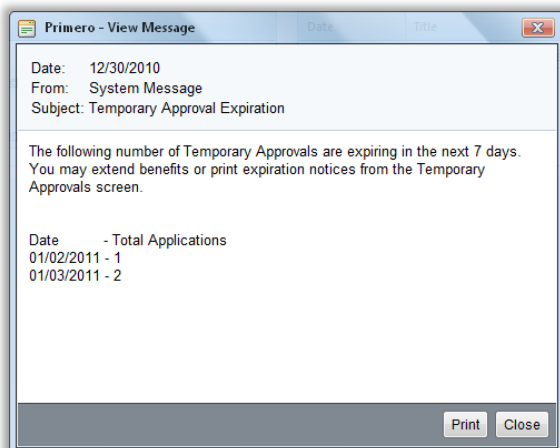


Dashboard Groups

The Dashboard offers two groups:

- **Announcements** – general messages for all users of PrimerEdge
- **My Messages** – specific messages to you about items in PrimerEdge

Clicking a link in the **Title** column in either group displays the **View Message** popup.



Navigate to Menu Planning

When you login to Primero you see one or more food services modules from Cybersoft Technologies that your district has chosen to use and that your role has permission to access. You will see one tab for each module.

To access the Menu Planning module

- Click the **Menu Planning** tab.

The **Menu Planning** home page lists up to four (4) menus in the vertical menu navigation bar on the left.



The **Menu Planning** module offers four (4) menus.

Note

The menus and menu functions to which you have access are those appropriate for your role with PrimeroEdge. Therefore, when you log on to PrimeroEdge, you may see a subset of the menus shown above, or you may not see all of the functions that are reviewed in this manual.

Log Out of PrimeroEdge

Logging out of PrimeroEdge can be performed from any page.

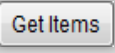

To log out of PrimeroEdge

- Click **Logout**.



How to Use This Manual

This manual uses style conventions to help you relate what you see in this book to what you see on the PrimeroEdge web site.

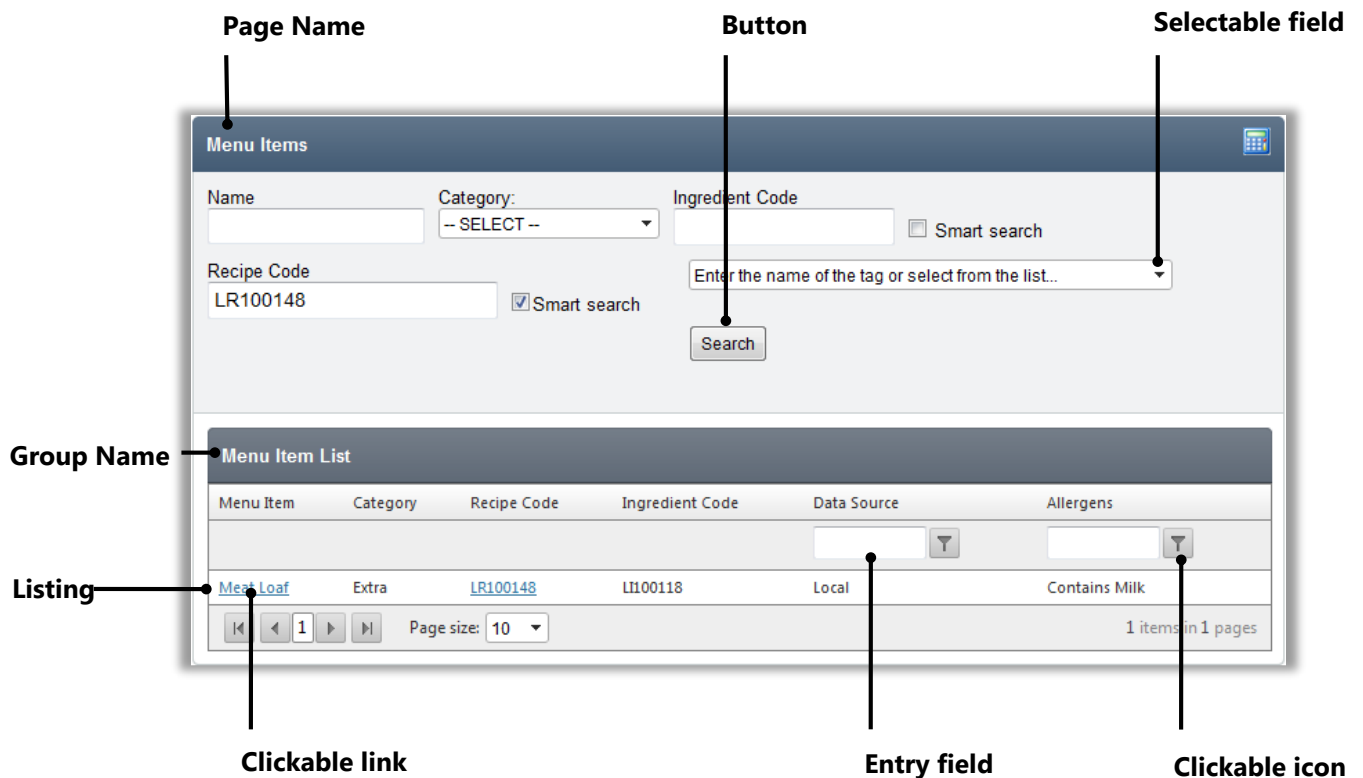
Item	Convention	Example
Button	Graphic as seen on page	Click  .
Clickable icon	Icon name in bold followed by graphic	Click Calendar ().
Clickable link	Blue, bold, italics, underlined	Click the <u><i>OrderNumber</i></u> in the <u>Order #</u> column.
Field name	Bold, <u>underlined</u> , capitalization as seen on page	In <u>Vendor</u> , select a vendor. In <u>Comments</u> , enter comment text.
Group name	Bold, capitalization as seen on page	In the Delivery Information group... In the Vendor Information group...
Key name	Small caps	TAB key ENTER key
Menu name	Bold, title caps	The Ordering menu is...
Menu selection	Bold, capitalization as seen on page	Select Modify Orders on the...
Message	Italics, enclosed in quotes, capitalization as seen on page	<i>“This is a new unsaved order.”</i>
Module Name	Bold, title caps, enclosed with square brackets	[Menu Planning]
Page name	<i>Italics</i> , title caps	On the <i>Create Orders</i> page...
Selection sequence	Bold, capitalization as seen on page, separated with “>”	[Menu Planning] > Ordering >Create Order
Window name	Italics, title caps	In the <i>Report Viewer</i> window, click...

Menu and Page Conventions

Menus






Pages

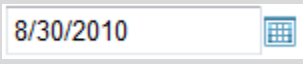


Icon Conventions

Several icons are used in this manual to alert you to particular information that is critical or helpful to your use of PrimeroEdge **[Menu Planning]**.

Icon	Name	What it means
	Note	Additional information on the use or function of the command or topic.
	Careful!	Information that is critical to the use of the function.
	Tip	Information that may help you use the function more effectively.

Special Functions

When you see...	You can...
	Place the cursor in a date section, such as Month, and click the ↑ key to increase the number or click the ↓ key to decrease the number.



Working with Column Data

Column data can be sorted when the pointing finger icon appears when the mouse cursor hovers over a column header.

- Click once on the header to sort the column data in ascending order.
- Click the header again to sort the column data in descending order.

Menu Item List								
Category	Menu Item	Recipe Code	Ingredient Code	Serving Size	Meal Contribution	Allergens	Data Source	Verified
Condiments	Base, Beef Base, AP, 6x1lb, NAMS	SR102567	SI102344	3/4 teaspoon			PDE Shared	Yes
Entrees	Base, Chicken Flavor No MSG Soup, 12/1 lb., Nestle	SR103517	SI102939	1 portion		Contains Gluten, Milk, Soy, Wheat.	PDE Shared	Yes
Condiments	Base, Chicken Flavor Soup Base, Harvest Value, 301	SR104225	SI102680	1 teaspoon			PDE Shared	Yes
Condiments	BBQ Sauce Condiment	SR100073		1 serving (1/3 cup)			PDE Shared	Yes
Entrees	Bean Burrito	SR100060		1 burrito	1 1/2 WG 2 Meat/MA 1/4 Veg-O	Contains Gluten, Soy, Wheat.	PDE Shared	Yes
Vegetables	Bean Salad, Fancy Three Bean Salad, Canned, Monarc	SR103145	SI102676	1/2 cup serving	1/2 Veg-O		PDE Shared	Yes
Vegetables	Bean, Butter, in Sauce,	SR102660	SI100478	1/2 cup (1/2 cup)			PDE Shared	Yes

A small triangle next to the header indicates the sort order:

-  (Ascending)
-  (Descending)

Menu Item List								
Category	Menu Item	Recipe Code	Ingredient Code	Serving Size	Meal Contribution	Allergens	Data Source	Verified
Condiments	Dressing, Dijon, Fat Free Honey Dijon, Ken's, 4133	SR100964	SI101150	2 tablespoon			PDE Shared	Yes
Condiments	Dressing, Fat Free Italian, Cains Foods	SR101218	SI101324	2 tablespoon			PDE Shared	Yes
Condiments	Dressing, Fat Free Raspberry Vinaigrette, Natural	SR104045	SI102259	1 1/2 ounces			PDE Shared	Yes
Condiments	Dressing, French Country	SR101528	SI101603	1 pouch			PDE Shared	Yes

Working with List Display Controls

Several pages display listings on multiple pages. Display controls are provided below the listings to move between the pages.

Menu Item List								
Category	Menu Item	Recipe Code	Ingredient Code	Serving Size	Meal Contribution	Allergens	Data Source	Verified
						<input type="text"/>	<input type="text"/>	<input type="text"/>
Condiments	Base, Beef Base, AP, 6x1lb, NAMS, Minor's, Nestle	SR102567	SI102344	3/4 teaspoon			PDE Shared	Yes
Entrees	Base, Chicken Flavor No MSG Soup, 12/1 lb, Nestle	SR103517	SI102939	1 portion		Contains Gluten, Milk, Soy, Wheat.	PDE Shared	Yes
Condiments	Base, Chicken Flavor Soup Base, Harvest Value, 301	SR104225	SI102680	1 teaspoon			PDE Shared	Yes
Condiments	BBO Sauce Condiment	SR100073		1 serving (1/3 cup)			PDE Shared	Yes
Entrees	Bean Burrito	SR100060		1 burrito	1 1/2 WG 2 Meat/MA 1/4 Veg-O	Contains Gluten, Soy, Wheat.	PDE Shared	Yes
Vegetables	Bean Salad, Fancy Three Bean Salad, Canned, Monarch	SR103145	SI102676	1/2 cup serving	1/2 Veg-O		PDE Shared	Yes
Vegetables	Bean, Butter, in Sauce, Canned, Monarch-D, 170283	SR102660	SI100478	1/2 cup (1/2 cup ladle)			PDE Shared	Yes
Vegetables	Bean, Canned, Beans, Refried, Vegetarian, 6/112, R	SR100255	SI100590	1/2 Cup (8 oz ladle)	1/2 Veg-BP		PDE Shared	Yes
Vegetables	Bean, Fancy Black Beans, Veg-BP	SR100537	SI100476	1/4 Cup Cooked, Drained Vegetable	1/4 Veg-BP		PDE Shared	Yes
Vegetables	Bean, Garbanzo (chickpea), Fancy, Canned, Monarch-	SR102598	SI100118	1/4 cup serving	1/4 Veg-BP		PDE Shared	Yes
<div> « 1 2 3 4 5 6 7 8 9 10 ... » « </div>							Page size: <input type="text" value="10"/>	3345 items in 335 pages

The total number of items (listings) and the total number of pages of listings is shown

Select a number from the **Page size:** list to change the number of listings displayed on a page

Click to display the last page of listings

Click to display the next page of listings

Click to display a specific page of listings

Click to display the previous page of listings

Click to display the first page of listings

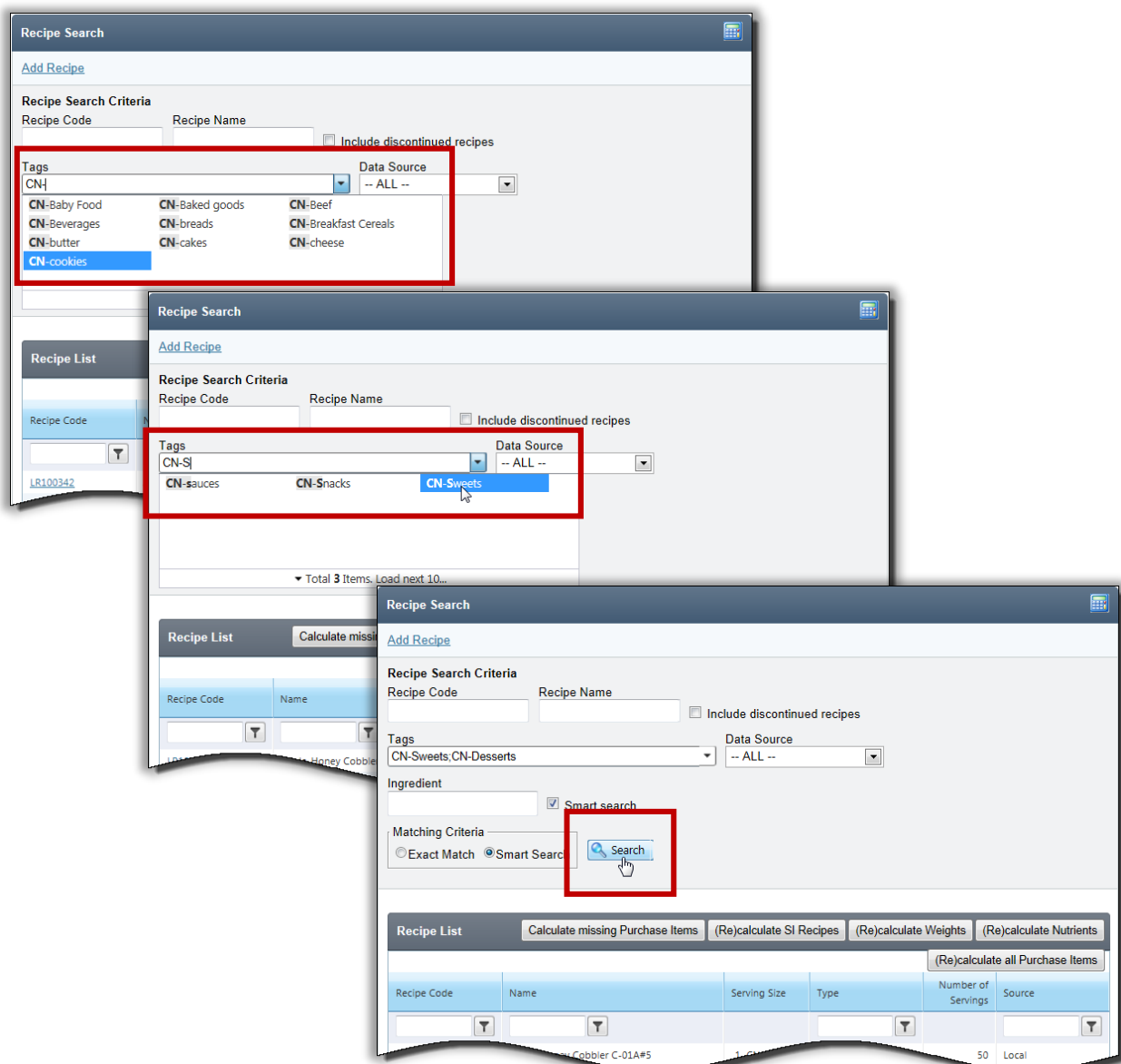
Working with Tags

Tags were developed to help organize data and find information more quickly. Several functions include tags, such as Recipes, Ingredients, Menus, and Menu Items.

To choose tags

1. Place the cursor in **Tags** and begin entering characters; a drop-down list of tags that match the entered characters is shown.
2. Continue to enter characters to narrow or filter the list of tags until you see the desired tag.
3. Click the tag name.



Use as many tags as needed to find the ingredient or recipe; separate tags with a semicolon “;”.

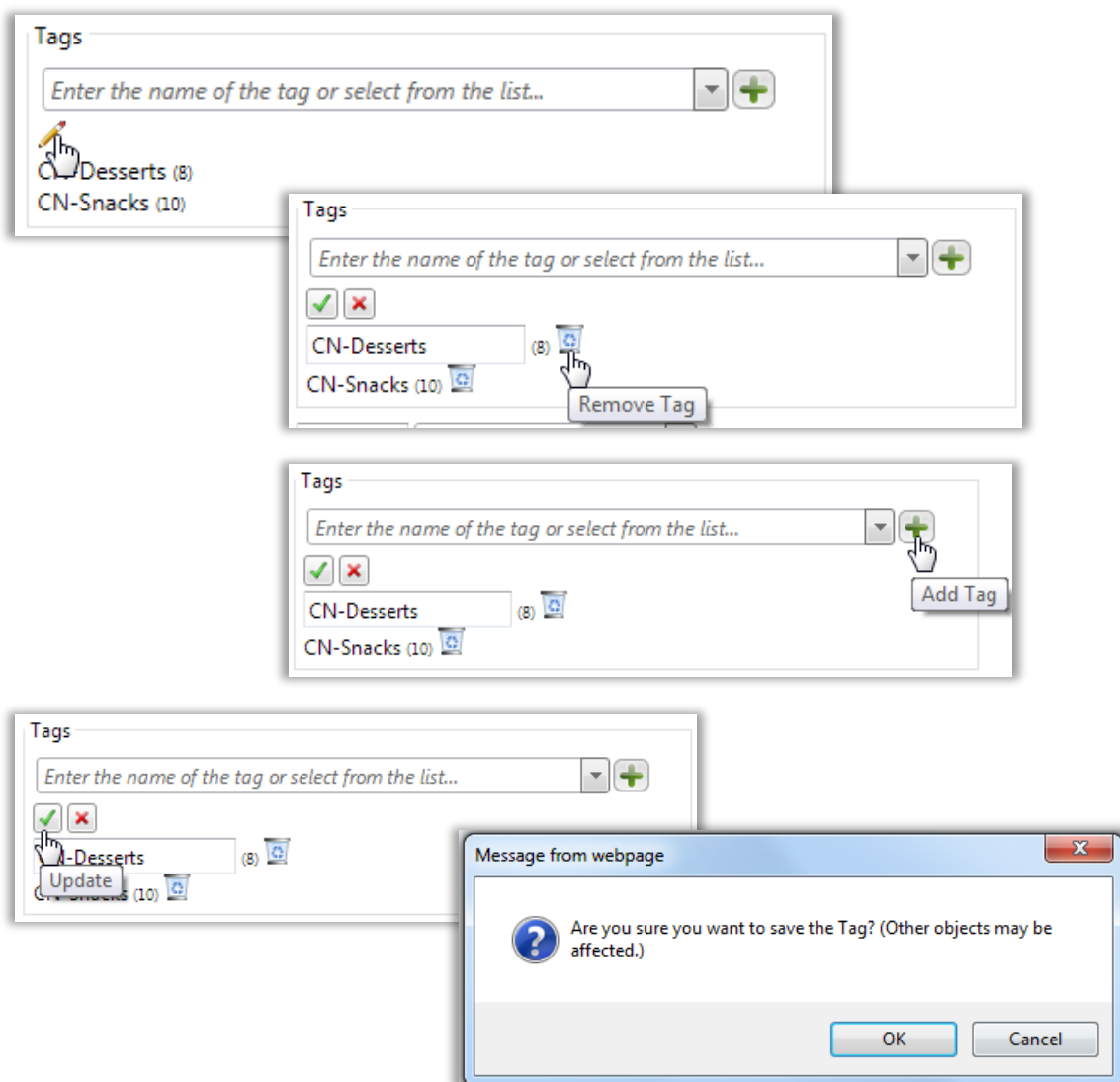


Managing Tags for an Ingredient

Ingredient tags can be managed through the **Tags** group on the **General** tab on the **Ingredients** page or **Recipe** page. Tags can be added or removed.

To manage Tags

1. Click **Edit** ().
2. Click **Remove Tag** () next to a tag to remove.
3. Enter or select a tag and click **Add Tag** () to add.
4. Click **Update** ().
5. Click  .



B

Terms

- ✓ Terms Used with Ingredients
- ✓ Terms Used with Recipes

Terms Used with Ingredients

Term	Description
Allergen	One of nine (9) substances that most commonly produce a hypersensitive reaction.
Allergen Indicator	One of three situations in which allergens may be present in Ingredients or Recipes: Contains, May contain, Processed in a facility that also processes [allergen]
Commodity/Recipe Code	USDA code.
Data Source	Method or process in which the Recipe is used; can be either: Local – database that includes Ingredients added by the user. Child Nutrition – database that includes USDA Ingredients. Cybersoft – database that includes USDA Recipes that use government commodity ingredients.
Ingredient Name	Full and complete Ingredient descriptive name.
Ingredient Short Name	Brief, shortened form of the full Ingredient name.
Ingredient Code	Unique ingredient identifier; automatically assigned by the system when the ingredient is added to the [Menu Planning] module.
Ingredient Form	The method by which the Ingredient is used: As purchased – the food is used in exactly the same form as it was purchased, meaning that no further preparation has been made to the food, such as unbaked prepared pizza or pre-fried egg roll. As served – the food is used after it has been further prepared, such as a cake mix that has eggs, oil and water added and then cooked.
Is Active	Indicates if the Ingredient is actively used in Recipes. When selected (check mark added), Ingredient is active. When cleared (check mark removed), Ingredient is not active.
Labels	Nutrition Fact labels provided by the vendor for an item that describes nutrient information.
Manufacturer	Ingredient maker or producer.

Term	Description
Prep Method	Methods used to prepare Ingredients, such as “bake”, “fry”, “broil”, etc.
Product Code	Code given to product by manufacturer.
Purchase Item	Name used when purchasing an item from a vendor.
Serving Size	Amount or count of a single serving.
Stock Item	Name used when purchasing an item from a school district warehouse.
Tags	Identifiers to help find the Recipe through a search function.
Weight	Weight or volume of a single serving.
Yield	The number of servings that can be produced from a set amount, typically one pound.

Terms Used with Recipes

Term	Description
Cook Time	(Cooking Time) Amount of time required to bake, broil, sauté, boil, cook the prepared Recipe Ingredients.
DOR	Display on Record (Ingredients tab of Recipe page) – when selected (check mark added), the image of the Ingredient is displayed on the Production Record in the [Production] module.
Fat	The percentage of increase or decrease in fat content after preparation, such as, the percentage of fat decrease that resulted from draining fat after cooking ground beef.
HACCP Process	(Hazard Analysis Critical Control Point Process) Includes all Critical Control Points used in the recipe production. HACCP Processes are created and changed through the Configuration > HACCP Configuration function.
Is Active	Indicates if the Ingredient is actively used in Recipes. When selected (check mark added), Ingredient is <i>active</i> . When cleared (check mark removed), Ingredient is <i>not active</i> .
Moisture	The percentage of increase or decrease in moisture content after preparation, such as occurs when dry noodles are boiled in the preparation of a casserole (moisture gain) or when apples are peeled and cored (moisture loss).
Number of Servings	Total number of servings produced by one Recipe production.
PI WIG	Purchase Item Weight in Grams
Prep Time	(Preparation Time) Amount of time required to prepare, assemble or combine the Recipe Ingredients up to the time that it is to be cooked or is ready to serve.

Term	Description
Pre-Preparation Instructions	Activities to complete before Recipe preparation begins, such as bringing Ingredients to a specific temperature before use.
Recipe Generation Type	<p>Method or process in which the recipe is used; can be either:</p> <ul style="list-style-type: none"> ▪ Nutrition Analysis Recipe – analyzed with the Yield Factor Method to provide a nutrient analysis that accounts for changes in nutrients caused by preparation and cooking. The Yield Factor Method requires that each raw RecipeIngredient be converted and entered in the Recipe as a “as consumed” or ready-to-serve (often cooked) Ingredient. <p>When building this type of recipe, user selects <i>ingredients</i> on the Ingredients tab.</p> <ul style="list-style-type: none"> ▪ Production Recipe – includes raw Ingredients and amounts in the uncooked state, directions for producing the Recipe, and the yield and serving size as prepared. These Recipes are generally used by cooks to prepare the Recipe or to calculate how much/many raw ingredients to order. <p>When building this type of Recipe, user selects <i>purchase items</i> on the Ingredients tab.</p> <ul style="list-style-type: none"> ▪ Dual Entry Recipe – recipe is used for both Nutritional Analysis and Production. <p>When building this type of recipe, user selects either <i>ingredients</i> or <i>purchase items</i> on the Ingredients tab.</p> <ul style="list-style-type: none"> ▪ Single Ingredient Recipe – recipe is created from a single ingredient, such as using the “As Purchased” “Bagel” Ingredient to create the “Bagel” Recipe which in turn allows for creating a Menu Item to be offered for a meal service. <p>The “default” Recipe type is set through the system setting: Default Recipe Generation Type ([System] > Management > System Settings > Menu Planning > Category:Ingredients).</p>
Recipe Name	Full and complete Recipe description.
Recipe Short Name	Brief, shortened form of the full Recipe name.

Term	Description
Serving Size	Physical size or weight of a single serving.
Serving Instructions	Specific directions for serving the prepared Recipe item, such as “Place cake slice in bowl and spoon 1 TBSP sauce over top.”
Tags	Identifiers to help find the Recipe through a search function.
Waste Factor	The percentage of waste material that results from the preparation of the Recipe, such as after preparing cookies, the percentage of unused icing that must be discarded.
WIG	Weight in Grams

◀ *End of Appendix* ▶

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